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ABSTRACT

In three chapters, this manual describes how a school board campaign should operate and presents an action plan for board candidates and their supporters. Chapter 1 discusses the candidate's role and duties. It covers the school board itself, qualifications for candidates, precampaign preparation, time required for a campaign, selection of a campaign manager, candidate preparation (including interviews, background reading, written and oral presentations, briefings, and community outreach), and campaigning itself, involving public appearances, door-to-door activities, press relations, name recognition, and meetings with the campaign manager, workers, and committee chairpersons. Chapter 1 also sketches the campaign wrap-up and outlines a week-by-week campaign timetable. Chapter 2 tells how to build a campaign organization, defines the manager's role, and delineates weekly timetables and functions for 13 committees and their chairpersons and members. The committees involve the areas of aides, absentee ballots, briefings, clerical work, finance, letters to editors and friends, mailings and literature drops, neighborhood gatherings, publicity, research, telephoning, and walkathons. Chapter 3 offers sample campaign literature for most areas, including letters, platform, brochures, and press releases. Two appendices list all state school board associations and suggest further reading. An index is attached. (RW)

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HOW TO RUN A SCHOOL BOARD CAMPAIGN A·N·D WIN

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MANUFACTURED AND PRINTED IN THE UNITED STATES OF AMERICA

To Phil, Steve, Jim, and Timothy; and
to our sense of common purpose.

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Preface

America's local school boards make a significant contribution to the process of governance. They provide a forum for educational issues, encourage public participation in school affairs, and ensure community input into the way our children learn to learn. School board elections are serious business and must be treated as such.

How to Run a School Board Campaign—and Win provides an explicit action plan for concerned candidates and their supporters. It demonstrates how a campaign organization can operate efficiently and above all effectively; it instructs communities in the creation of open participatory campaigns that can be used as platforms for public dialogue and debate regarding local educational issues. Perhaps most important, as its title states, it explains what is needed to achieve victory.

As a winning candidate who was steered by Ms. Schwartz through several hotly contested elections, I can personally attest to the efficacy of her guide. I have seen it work for other prospective board members as well, despite heavy odds. *How to Run a School Board Campaign—and Win* is based on proven success in real communities. It represents social research at its best.

Since campaigning is clearly a team effort, teamwork is emphasized throughout the text. The roles of the candidate and the campaign manager are stressed. Both work equally hard to identify and mobilize supporters; both have specific, clearly delineated tasks. Neither can progress very far without the other. As a former candidate, I know what a major difference a skilled campaign manager can make—to the candidate and to the community.

School boards will continue to fulfill their important role as long as concerned citizens seek, find, and support quality candidates. This guide to effective management will help provide school governance with the winners it needs!

Frank L. Smith, Jr.
Teachers College
Columbia University

Introduction

Our family moved to Ridgewood in 1962. We chose this northern New Jersey community largely because of the reputation of its school system. My husband and I brought to our new environment a commitment to the concept of *civitas*, the idea that men and women owe their communities a part of their energies.

As parents of three school-aged children, we opted to center our involvement around the Ridgewood schools. I soon was affiliated with a number of education-oriented organizations, and, as Home and School Association representative to the Ridgewood Board of Education, early on recognized the impact of individual board members on the establishment of school policy. This realization led me to many years of active campaign work, backing candidates whose philosophy I felt would impact most favorably on my children's education.

My introduction to campaigning was as the sponsor of a neighborhood gathering at my home. The following year I served as a campaign strategist, researcher, and treasurer and subsequently managed five school board campaigns, all of which were successful. During those years of campaign management, I also served as a consultant on campaign efforts, both locally and in other communities. The interest evidenced in my expertise led me to assemble a compendium of my campaign materials around a composite candidate, John/Jane Doe. That text became the first draft of this guide.

I was fortunate to have the opportunity to field-test my fledgling manual in 1979, when a group of concerned citizens in Harrison, New York, requested my services as consultant during a school board campaign. With some initial guidance and training from me, they used the guide successfully to win away the seat of a supposedly unbeatable incumbent, losing a second seat by only five votes. The outcome of the Harrison elections confirmed my belief in the importance of professionalism in school board electioneering. Because it is run on a volunteer basis, the successful campaign must be tightly coordinated and firmly directed, with each participant clearly aware of his or her role and prepared to function as effectively as possible.

The following pages are an expanded version of my original guide. They are devoted to sharing what I have learned about successful board

of education campaigning with others dedicated to the health of our schools: prospective candidates, campaign managers, committee chairpersons and members, and part-time volunteers. Although centered largely around my experience in Ridgewood, the material can easily be tailored to fit individual community needs.

Conceived as a working tool, the manual is divided into three chapters. Chapter 1 outlines the candidate's role and duties, emphasizing adequate precampaign preparation and providing a week-by-week campaign timetable and an overall campaign plan. Chapter 2 deals with the campaign organization, detailing how to build a forceful, professional campaign structure that will carry the candidate to victory. The role of the campaign manager is stressed, and the function of each campaign committee, its chairperson, and its workers is explained. Weekly timetables are included for the campaign manager and all committee chairpersons. Optimal use of the three campaign resources—manpower, time, and money—and the importance of a coherent campaign strategy are stressed. Chapter 3 gives examples of campaign literature. These sample documents, including letters, platform, and brochures, proved successful in Ridgewood. They are intended to serve both as models and as adaptable reference tools for campaigners elsewhere. The major documents are accompanied by a brief analysis of their contents. The book concludes with a complete list of addresses for state school board associations and a bibliography of articles that the reader might find interesting and helpful.

Special Note

This book includes everything a candidate needs to run an intensive campaign. Since all campaigns and communities are different, the intention is that a candidate choose from among the items included and use those that are appropriate for his or her situation.

For example, a candidate in a small town might need only three or four advisors instead of the thirteen or more that are suggested here. The campaign strategy might also be different, with an emphasis on attending parades, fairs and other events advertised in the community newspaper and on being seen at football and basketball games, sidewalk sales, school open houses, parent organization meetings, etc. Garage and bake

sales can be used to raise money. Going door to door and distributing literature is a key campaign tactic in a small community.

Candidates in rural districts will also have to adapt this book's campaign plan to fit their local situation. If the members of the community are geographically spread out, travel time and expense and long-distance phone calls will have to be worked into the campaign plan and budget. In many rural communities, there is no single newspaper to tie things together, so the candidate will have to find other ways of reaching people.

Despite the differences among communities, all candidates and campaign workers will find the information in this book to be a great help in putting together a successful campaign.

I believe that my own campaign work attests to the impact an individual citizen can have on the school board election process. With the help of the following action plan, the most inexperienced community member should be able to organize effectively to promote the candidate or his or her choice.

Good campaigning and good luck!

Cipora O. Schwartz
October 1982

Chapter 1

The Candidate

Managing schools effectively demands more than ongoing dedicated direction from a professional staff. It also requires the commitment, concern, and involvement of parents and other citizens. As long as our boards of education are elected bodies (some are appointed, but that is not what this book is about), legally responsible for the operation of the schools, candidates and election campaigns must be seen as serious, professional vehicles for making the education system work in behalf of the students. Despite the fact that the candidate and the campaign workers are volunteers, they need to make a truly professional effort because of the importance of education in our children's lives.

The candidate should remember at all times that the key to his or her success is that willingness to make a professional effort to win.

About the School Board

The U.S. Constitution is silent about education. Therefore, public education is considered a function of the state, and school board members are delegated their powers by the state. They work on the local level for the purpose of meeting the educational needs of their communities. There are over 95,000 school board members in the more than 15,000 school districts in the United States. The following information is based on the Ridgewood, New Jersey, Board of Education—it may vary considerably in your state and community. The information included here is simply meant to give a general idea of the kinds of responsibilities and requirements attached to school board campaigns. It is essential to check with your local and/or state board of education office concerning rules in your area.

1. Membership requirements. The Ridgewood Board of Education is composed of five unsalaried members elected at large in a special election

by voters of the community. Each year, one or two members are elected to three-year staggered terms. Board members must have the ability to read and write, two years residence in the district, and may have no interest in any contract with, or claim against, the board.

2. Responsibilities. The school board is responsible for conducting, equipping, and maintaining the public schools. Its duties include:

- Appointment of the superintendent of schools.
- Formulation of policy for managing schools and school properties.
- Creation of rules governing the employment and discharge of school board employees.
- Enforcement of state school board regulations.
- Approval of textbooks selected by the staff.
- Designation of the course of study the schools will pursue (in conjunction with the county superintendent).
- Submission of fund-raising proposals to the voters, the monies involved will be used to construct, operate, and maintain the educational plant.

All transactions must take place and be voted on during board of education meetings. These meetings are required by statute to be public.

3. The election process. Candidates are nominated in Ridgewood by a petition signed by ten registered voters of the community. Many more names may be needed in other communities. (For instance, we know of one community which requires 1,500 signatures.) Petitions can be obtained at the Board of Education offices. Upon completion, they should be addressed to the Secretary of the Board of Education and must be filed by 4 p.m. on the fortieth day before the date of the election. Voters must be U.S. citizens, over eighteen years of age, and residents of the county for at least forty days. They must be registered voters locally.

Again, the above information might not apply in your community. Be sure to check with your local board of education for specifics.

Qualifications for Candidate

If you are interested in becoming a candidate or in nominating someone to run for your local school board, you should keep in mind that

there are certain characteristics a potential candidate should have:

1. A commitment to public education and the furtherance of excellence in the public school system.
2. The time and ability to evaluate and judge complex material.
3. Flexibility and open-mindedness. The school board is not intended as a forum for furthering a narrow religious or personal philosophy. Effective board members must have an open ear to the public, be willing to change or negotiate their position, and know when to back off.
4. High concentration and energy.
5. A reputation for integrity and a background that will bear public scrutiny.
6. An open attitude and easiness with people.
7. The ability to articulate ideas and feel comfortable in a variety of speaking situations.
8. Decision-making skills. Options cannot be weighed indefinitely. Some problems need to be tabled until such time as an equitable solution is possible. Others may require prompt action.
9. Tenacity. Candidates must be able to withstand public pressure when certain of their own position.

Time Required

The time a candidate needs to devote to the campaign can be divided into three segments: preparation time, campaigning time, and time of service.

Preparation time. The amount of preparation time will depend largely on how well versed the candidate is in school-related matters at the moment of the decision to run. Even a novice, however, can do the necessary homework during weekends and evenings. The intensity of the preparation will depend in part on how long before filing date the candidate has decided to enter the race.

Campaigning time. This will vary depending on the nature of the campaign. If the seats are hotly contested, the community's problems are of general concern, and there are a number of candidates, campaigning time might total from twenty to forty hours per week. In a lower-keyed contest, the candidate might only devote about ten to fifteen hours a week

to public appearances and the preparation of written material.

Time of service. Once elected, the time a board member will be required to devote to the job will vary depending on the size of the student body, the size and quality of the professional staff, the nature of administrative support, and the qualities of fellow board members (the speed with which they are capable of making decisions, for example). Generally speaking, the following time frame can be anticipated:

- A weekly or monthly (check with your local board) board meeting lasting three to four hours.
- Several hours of preparation for the meeting. This will largely involve reading packets of material supplied by the professional staff.
- Extra time to fulfill individual assignments. A board member on a negotiating team, for example, would need to expend extra time during a period of teachers' negotiations, while a board member who is interested in county or state boards of education would attend meetings of those bodies.
- Time to keep in personal touch with the citizens to hear their concerns and comments.

Selecting a Campaign Manager

Choosing a campaign manager is the most critical decision a candidate makes. It is essential that the campaign manager be someone who shares the candidate's philosophy, someone whom the candidate trusts and feels comfortable with. The ideal campaign manager will have prior managerial and fund-raising experience and will be knowledgeable about local school matters. The candidate could also select as campaign manager a community member who, although unversed in school board affairs, has worked in local partisan politics. A concerned citizen with no prior experience but possessing organizational skills and the desire to approach the job with a professional attitude might also make a good campaign manager. The guidelines laid down in Chapter 2 of this book and the help of a well-organized and tightly monitored staff should help any campaign manager mount a winning campaign.

The qualities a candidate should look for in choosing a campaign manager are a political sense (i.e., the ability to judge, appraise, and use

the political climate of the community), intelligence, creativity, flexibility, high energy, the ability to be a tough negotiator, and the capacity to get along well with people.

A cooperative relationship should be established between the candidate and the campaign manager, with general policy agreed upon by both and all written and printed material approved by both. The campaign manager must, however, have the power to make final decisions regarding the campaign organization, so that the candidate doesn't have to spend valuable time dealing with the minutia of the day-to-day running of the campaign. The areas where the campaign manager has final decision-making power must be agreed upon before the campaign begins. In small districts, a candidate often serves as his or her own campaign manager.

Candidate Preparation

Some candidates will have been interested in school-related matters for years; others will be new to the scene. In either case, the serious contender should carefully research a number of areas before meeting with the voters.

Effective preparation could include the following areas.

Personal Interviews

The first item on the candidate's agenda should be to learn as much as possible about the local school system. Interviews with the following established sources of information should be scheduled as soon as mutually convenient. Notes should be taken at all meetings for subsequent reference.

Some candidates may have trouble getting cooperation from some of the following sources. If so, the candidate will need to find a knowledgeable individual to discuss the school situation with, and will need to concentrate more on becoming informed through background reading (see next section).

Parent organizations or PTA presidents. It is important to establish personal contacts with these informed parents who have proven themselves to be concerned and influential community members. (In

some communities, PTAs are known as Home and School Associations.) Candidates should inquire about the strengths, problems, needs, and potential of the schools with which they work. They should also ask for suggestions about how the schools might be improved. This information can be helpful in pinpointing campaign issues.

School principals. These interviews offer an opportunity to become acquainted with the curriculum and the physical plant of the local schools. Candidates should request a tour of the premises and query principals about the size of staff and student body; the curriculum; special arts or humanities programs, or any other special programs developed for or by that particular school; when the school was built, its acreage, condition, number of floors and classrooms; library and parking facilities; physical education program and facilities; and any unique problems or assets. Candidates should also familiarize themselves with the makeup of the school community, keeping in mind that in larger school districts strengths and needs can differ from school to school. Sensitivity to variations in local problems and needs will favorably impress voters.

Central administration personnel. The central administration building houses the professional administration of the school system as well as the board of education offices. It may be included in the school plant or be situated in a special location. Candidates should meet with the following central administration personnel (some systems may not be large enough to have all of these positions):

- Superintendent of schools (to obtain an overview of the school system).
- Assistant superintendent for business, or the board secretary (to gather budget and appropriation information and to learn the status of renovation or other building projects, if any).
- Assistant superintendent of instruction (to obtain details concerning the curriculum).
- Department heads, including those concerned with special education, physical education, reading, mathematics, and guidance (for briefings about their individual roles, class sizes, recent developments in their special subject areas, and a rundown of department programs and strengths). Pertinent literature should be requested.
- Affirmative Action officer or committee (to learn about staffing

policy and check to what extent current legislation is being implemented). Literature should be requested as above.

Candidates should also request a tour of the central administration building, establishing its condition, when it was built and number of floors, offices, and other rooms. Staffing needs and parking facilities should also be investigated.

Present board members. All current members of the board of education should receive a courtesy call from the candidate. The candidate should come to those meetings equipped with specific questions concerning recent improvements of school plant and the long-range agenda for implementing current programs.

Former board members. Interviews with past board members can help the candidate to assess the strengths and weaknesses of the school system. These meetings will give candidates historical perspective, knowledge of the local political climate, and an insight into community needs as they have been articulated in the past.

Local specialists. Informed community members can provide the candidate with expert knowledge in key areas. Sources to be tapped include: the League of Women Voters, many chapters of which include an educational study group that provides information on legislation regarding state funding of schools, as well as a *Know Your Candidate* booklet; local National Organization for Women (NOW) chapters, which can furnish information on status of Affirmative Action implementation; the business community; minority organizations; and individual lawyers, educators, and financiers whose expertise includes school-related matters.

President of the teachers' association. A visit with the head of the local teacher's professional organization will give the candidate insight into the strengths and weaknesses of the school system, as viewed by the professional staff, and clarify the teachers' relationship with the community, administration, and schools. The candidate should ask for a printed copy of the current contract between the association and the board. This usually takes the form of a booklet that details teachers' working arrangements, pay scale, and benefits.

Background Reading

There is a substantial amount of pertinent literature available to

candidates. Some state school board associations are excellent sources, providing pamphlets in such areas as "school law," how to become a board member, and basic "boardsmanship." Also, county associations sometimes sponsor workshops for candidates. Relevant reading matter can often be found at local board of education offices or can be obtained by writing to the state school board association. As it is gathered, pertinent information should be categorized and classified in folders. Subject areas that might be researched include:

School legislation. Copies of pertinent laws can be obtained through local or state boards of education.

Budget. The candidate will have received useful information in this subject area during the interview with the assistant superintendent of business or local school district business officer or treasurer. Written material should be checked by the candidate for enrollment and staffing data as well as census and unemployment figures (these can be obtained at the central administration building). State teacher associations will provide information concerning local and neighboring-district budgets, pupil/teacher ratios, and salaries.

Affirmative Action. Information received from the Affirmative Action officer or committee at the local administration center could be supplemented with readings in related federal and state law. The Affirmative Action plan currently in operation in the schools will need careful attention.

Sex education. The candidate should become acquainted with state-mandated programs, if any, and should also become familiar with local programs and general community attitudes toward this controversial issue.

Special education. In addition to information received from the special education department head at the administration center, the candidate should read up on relevant legislation. Documentation is available through the state board of education. If there is a parents' special education association or committee, the candidate should speak with the chairperson, president, or steering committee head to ascertain the parents' view of the present program, including strengths and weaknesses.

Staff evaluation. Candidates should familiarize themselves with the staff evaluation forms used locally. These can be obtained at the board of education offices. Another useful source of information often available

at board of education headquarters is a booklet distributed to all staff members that describes the evaluation process. Information about teacher assignments will provide the candidate with an additional way of forming conclusions about how time is used and perhaps wasted.

Standardized tests. Student performance locally in such tests as the Iowas and the SATs should be compared with scores nationally as well as with results achieved by similar nearby communities that have equivalent student-dollar costs. This will help the candidate determine strengths and weaknesses in the local school program.

Renovation or building programs. Information on such programs, if contemplated or recently completed, is available at the local central administration building. When interviewing the assistant superintendent for business, the candidate should ask to see any proposals, architect's evaluations, or pertinent reports by citizen committees. Plant expansion is a matter of special interest to citizens in terms of tax dollars, and the candidate should be prepared to answer questions in this area. Also, the question of plant sale or lease due to shrinking student population should be studied. This is a loaded subject, because it often means redistricting, and is an area that must be dealt with sensitively.

Board of education minutes. These documents, which are public information, can be obtained at the administration center. Reading two or three years worth of minutes will provide the candidate with valuable information concerning the history of the board, major parental concerns, and other board members' stands on issues.

News articles. Regional and local papers, including giveaways, should be carefully studied for relevant articles on current developments in the schools. Library newspaper files on issues are also useful. Keeping clipping files of articles about pertinent issues may be very helpful.

A candidate should also become familiar with election laws regarding financing the campaign (see the finance chairperson) and become aware of the great importance of keeping detailed financial records. This is a *must* both in order to indicate an orderly, well-organized campaign and to satisfy end-of-campaign reporting requirements.

Written Presentations

The written material that will serve as the core for all campaign

literature is essentially generated by the candidate. It takes two forms: biographical information and the official platform.

Biographical information. This should be presented in the form of a brief (300-500 word) statement containing the candidate's educational background, professional achievements, civic activities, and affiliation with the schools, if any (see sample biographical sketch in Chapter 3). The candidate should also make available a selection of photographic proofs (head and shoulders) for selection by the campaign manager and the publicity chairperson for publicity purposes. Photographs of the candidate "in action" with groups, at meetings, and so forth might be useful for brochures and other campaign literature.

Platform. Based on information gathered from the interviews and readings cited above, as well as school needs and goals, as he or she sees them, the candidate should develop a statement of purpose or platform. This document (see sample literature in Chapter 3) will serve as the basis for brochures, letters, and other written material. The platform should include:

- The candidate's personal philosophy on public education.
- Why the candidate is running.
- Issues the candidate wants to address.
- Contributions the candidate feels he or she can make to the educational system.
- The candidate's analysis of the school system's needs.
- The candidate's philosophy regarding local education.
- The candidate's view on important issues surrounding the schools, including funding, curriculum, declining enrollment, and negotiations with teachers.

Speeches

After committing the platform information to paper, the candidate can now develop a speech to be used at campaign functions. These occasions are twofold: those held in private homes (cocktail parties, coffees, wine and cheese gatherings), grouped here under the general term "neighborhood gatherings"; and appearances at public forums sponsored by political parties, the League of Women Voters, parent organizations, local parochial schools, etc.

Speeches should average about ten to fifteen minutes. At public

forums, where only five minutes are usually allotted to each candidate, the presentation should be pared down to fit. Speeches should be serious but simple in tone and be structured to emphasize the candidate's philosophy and intent (see the sample speech in Chapter 3). If addressing a special interest group (special education, gifted children, etc.), the candidate should target the speech by discussing in greater depth issues of particular interest to the listeners at hand.

Suggestions for effective speeches include:

Quiet dress. Candidates should dress conservatively for both neighborhood gatherings and public forums. For men tending toward longish hair and rumpled clothes, this is the time for a haircut, a pressed jacket, and a tie. For women candidates who fancy the latest look, this is the time for a conservative suit, or a dress and jacket in muted colors. Avoid flashy jewelry. The candidate's hairstyle should be kept the same as in the official campaign photo for easy recognition.

The noting of important issues, themes and numbers (budget figures, etc.) on 3" x 5" cards for quick reference. This is especially important during the initial presentations. The last of these cards should contain the names of the host or hostess and children in the family so that the candidate can thank all concerned for their hospitality.

The use of simple visual materials to highlight the text. For example, easily readable charts will help to clarify statistics.

Good delivery. The candidate should stand to address the audience, with a glass of water within reach, and should speak clearly and slowly with occasional pauses, letting his or her eyes wander around the room. Care must be taken to speak loudly enough to be heard by the entire audience.

Audience involvement. This can be achieved through the use of such phrases as "we must all work together."

Ignoring the opposition. The candidate should refrain from giving other candidates free publicity by mentioning their names.

The candidate should practice delivering the presentation alone until the material is thoroughly familiar. The presentation should then be tested before the campaign manager and three or four committee chairpersons for length, articulation, style, and content. It is productive to tape the trial presentation for later review. All criticisms should be

carefully considered, and the presentation should be adjusted and polished accordingly. The trial presentation will also serve as an opportunity for the candidate to practice handling a trial question-and-answer period.

Approximately three days after the initial trial presentation, a follow-up test of the oral presentation should be made, including a second trial question-or-answer period. The candidate will then be ready to face the public.

At first, the candidate may want to read from cards, but as the campaign progresses, the presentation will become increasingly familiar until it can eventually be delivered without notes. (The 3" x 5" cards bearing the names of party-givers and their families should be retained, however, since in the heat of the campaign effort, the candidate may not have time to absorb this information.) Strong preparation will better enable the candidate to answer questions intelligently during the question-and-answer periods that follow all neighborhood gatherings and public forums.

Briefings

While the candidate has been developing the oral presentation, the briefing chairperson and five or six briefing committee members will have prepared a list of questions dealing with touchy issues. These queries will resemble those likely to be directed at the candidate during question-and-answer periods at neighborhood gatherings and public forums. Briefing aides should be selected from a cross-section of the community (e.g. all sections of town), elementary, junior, and senior high parents, and special interest groups such as special education.

When the question list is complete, two briefing sessions should be scheduled to coincide as closely as possible with the trial oral presentations. During these "grill" sessions, the candidate will answer the questions prepared by the committee, and the briefing chairperson will take notes on the quality of these responses. The answers will then be analyzed to pinpoint areas where further preparation is needed, and the candidate and briefing chairperson will develop responses to queries in the needed subject areas. All candidate responses should be as clear and

succinct as possible.

Briefing sessions are an invaluable tool in preparing the candidate for the voter. A list of sample questions is provided in Chapter 2 (see Briefing Chairperson).

Community Outreach

Attendance at board of education meetings. Check with your local board of education office to find out how often public meetings are scheduled in your area. The candidate should attend as many of these meetings as possible to become familiar with the board's agenda, to increase his or her visibility, and to ask carefully phrased questions that may later be quoted in the local papers. Such exposure will help establish the candidate as a concerned citizen with a responsible attitude toward school-related matters.

Telephone calls. A few days before he or she announces candidacy publicly in the local press, the candidate should make personal phone calls to friends, potential supporters, and citizens involved with the schools to let them know that he or she will be running for the board. These courtesy calls serve as an excellent first step toward drafting campaign workers. The campaign manager should follow up on these initial contacts and provide those willing to volunteer for the campaign with a specific task assignment.

Letter writing. Prior to the official announcement of candidacy, the candidate should send out two letters:

1. A pre-announcement letter to local acquaintances. About a week before announcing, the candidate should attempt to enlist uncommitted voters by writing to all of his or her personal acquaintances in the community. The letter will stress that each vote is important, that the candidate needs the recipient's help and wants the recipient to be among the first to know of the candidate's decision to run for office (see sample letter in Chapter 3).

A number of the people receiving a pre-announcement letter will also receive a personal telephone call from the candidate (see above).

2. A letter to committee chairpersons and early supporters. About three days before announcing, the candidate should write to those already in his or her camp, thanking them for their commitment. This will help keep the momentum going (see sample letter in Chapter 3).

The kick-off party. In a campaign plan or strategy, introducing the candidate to prospective voters, workers, and supporters is the first aim of every action. This includes the kick-off party, an event which takes place soon after the campaign begins. The candidate preparation period has been completed and the stage is set for the onset of the campaign.

The kick-off party is the responsibility of the campaign manager, who will draft the guest list (at least fifty people), which will include all committee chairpersons and volunteers already committed to the campaign. After consulting the candidate for names of friends, neighbors, and prospective supporters, the campaign manager should write and send out the invitations and arrange for the refreshments. These might include wine and cheese or coffee, tea, and dessert. If the campaign manager does not have a home with the appropriate space requirements, the party can be hosted by a committee chairperson or by one of the candidate's close friends.

As noted above, the thrust of the kick-off party is candidate exposure. It will be the candidate's first public presentation and his or her initial exposure to answering questions from the floor. It is important that this first public presentation take place in a positive setting, before a group of known supporters and workers, rather than in potentially hostile territory. The candidate should welcome this opportunity to gain confidence and experience and to iron out all kinks in his or her delivery. A member of the campaign organization should be assigned to take notes during this initial public presentation and the following question-and-answer period. This documentation will serve as a basis for analyzing areas in which the candidate shows strength and those in which weakness is apparent.

At the end of the party, the host or hostess, in thanking those who have attended, will ask for their support, mention that there is a sign-up sheet for workers at the front door, and ask that guests pick up biographical material as they leave.

The day after the party, all participants should be telephoned, thanked for attending, asked for their input on the candidate's performance, and requested to help in the campaign. The campaign manager and the briefing chairperson should then meet with the candidate to critique the oral presentation and the fielding of questions and answers. The presentation will be fine-tuned and adjusted accordingly, in preparation

for the many neighborhood gatherings and the important public forums to come.

The candidate is now ready to file; it should be noted that filing earlier than the date set as the final deadline for filing has certain advantages. It permits more extensive candidate preparation and puts less pressure on the campaign structure. There is more leisure in which to recruit and assemble a campaign team and to prepare campaign materials.

Campaigning

Public Appearances

Again, exposure to the voters will be the major thrust of the campaign effort. The candidate must never forget that every convinced voter can bring in as many as ten additional votes by influencing fellow community members. During the period of active campaigning, the candidate should continue to attend board of education meetings and to appear at as many neighborhood gatherings and public forums (if they are held in his/her district) as possible. There may be four or five forums scheduled during the last two weeks of the campaign. Neighborhood gatherings may number from six to eight weekly in a heated campaign and four to six weekly in a low-key effort. The campaign manager will provide the candidate with a schedule for all appointments and interviews including time, date, and names and addresses of the host family. The candidate should arrive at all scheduled events on time.

Door-to-Door Campaigning

In small towns and high-density areas, door-to-door campaigning has proved to be a very effective way of reaching the community. If this technique is used, the candidate should be accompanied by a resident from the district who will also distribute literature. (In some communities, a permit to distribute literature must be obtained.) Door-to-door campaigning is generally done weekday afternoons and at dinner time, and weekend afternoons, when more people can be expected to be home. Stay away from late evening and early morning hours.

Public Forums

Public forums are sometimes sponsored by:

- The League of Women Voters (evening gatherings held at the schools).
- The Parent-Teacher Association (evening gatherings held at the schools).
- The Teachers' Association (after-school gatherings held at the high school).
- Parochial schools (Sunday afternoon gatherings held at the schools).
- The Democratic and Republican Clubs (gatherings held during their monthly meetings).
- Local labor groups, unions.
- Farm organizations.
- Neighborhood associations.
- Senior citizen groups.

The public forum offers the sole opportunity for a voter to see all the candidates express their views in a single neutral location. As candidates reply in turn to the same questions, usually submitted by the sponsoring organization in advance, the citizenry compare candidates' views and the quality of their timed responses. Audience members can address their own questions to one or all of the candidates as well.

In a community where public forums do not exist, the campaign manager should contact the organizations cited above and request that they sponsor forums. Such gatherings offer a public service to the community.

Forums will probably be scheduled at intervals (two weekly) during the last two weeks of the campaign period. They should be held in a central location or in a reasonable geographical distribution so that all citizens will have an opportunity to attend. The public will learn of the forums through the sponsoring agent, which will contact its membership; the local newspapers, which will publicize the event, and sometimes the schools, which may send announcements home with the children, and/or make an announcement over the public address system. In some states and local school systems, there are policies which will not allow this. Check it out. The candidate might have to take the initiative in publicizing public forum appearances by issuing his or her own press release if the local newspapers are unresponsive.

Forum dates should be cleared as early as possible in the campaign to avoid conflicts with the scheduled neighborhood gatherings. In the event that the candidate is forced to cancel a neighborhood gathering in order to attend a forum, whoever is sponsoring the neighborhood gathering should supply the invited guests with the forum place and time.

Dealings with the Press

Three to five weeks before the election the candidate should request interviews with the editors and publishers of the local newspaper, shoppers, and school newspaper. By now the candidate will be extremely knowledgeable about his or her platform and the nature of community needs, and should come to these meetings with the press equipped with campaign brochures, press releases, and any significant personal statements that have already appeared in print. During these meetings, the issues and the candidate's platform will be discussed. The candidate can then request an editorial endorsement, except in the case of school newspapers, where such endorsements are not made. If the candidate finds the press to be hostile or unresponsive, he or she may have to run more newspaper ads to get coverage.

Name Recognition

In some communities, the use of slogans, cartop signs, and lawn signs are traditional and effective methods of making voters familiar with the candidate's name. Using signs, however, is sometimes prohibited by local ordinances, so check your local laws before investing any time and money in these.

Meetings with Campaign Manager

The candidate should meet with the campaign manager weekly. This regular meeting time should be established early in the campaign and is preferably held early Saturday or Sunday morning (the candidate is likely to be campaigning or attending neighborhood gatherings in the afternoons and/or evenings). The purpose of this meeting is to review strategy, assess results, and examine upcoming campaign needs for which the manager and the candidate are responsible, e.g., the drafting of statements for the newspapers and for public forums, scheduling needs, etc. There will also be a general evaluation of "how things are going." The

candidate and campaign manager may also communicate daily by telephone, as needed.

Note: The campaign manager should structure the candidate's time in such a way that the latter has a personal day weekly for private needs and for rest. Time should also be plugged into the schedule for meetings with the newspaper editors and for writing the replies for questions posed at public forums. In a low-key campaign, the candidate may set aside two days of unscheduled time. The second day should be used to telephone chairpersons and key workers, to encourage, thank, and touch base.

Meetings with Committee Chairpersons (All-Committee Meetings)

It is productive if the entire campaign organization meets twice during the campaign. The first all-committee meeting should take place two weeks after the start of the campaign, the second two weeks before the election. If the campaign schedule does not permit two meetings, the latter date is preferable. Individual committee schedules should be adjusted accordingly. The meetings should be structured as follows: the campaign manager should welcome those present, give an overall account of the status of the campaign effort, analyze the previous weeks' operations, and project the evolution of the weeks to come. Each chairperson will be asked to give a committee report, including nature of work, needs, successes, and problems. The candidate will then be requested to share his or her observations and insights regarding the campaign and discuss voter reactions as noted at neighborhood gatherings and public forums. The candidate, above all, should use this occasion to thank those present, acknowledging their support and work. The campaign manager should then ask for comments, sum up, thank everyone, reassure all present, and urge the group on. The goal of these meetings is to:

- Compare notes. Chairpersons work in isolation from each other; often the feeling is "No one is working as hard as I am." This is an opportunity for mutual evaluation and a time to confirm that *everyone* is working.
- Give the chairpersons an opportunity to examine their committees' work within the context of the entire campaign strategy, give reports, and plan and assess their strengths and weaknesses.

• Demonstrate that the campaign is a team effort, strengthening workers' ties to each other and to their cause. During the election, things are so hectic that campaign workers sometimes forget *why* they are involved in the campaign. The all-committee meeting is a moment for touching base and also for rededication to the cause of electing a candidate of their choice.

Interaction with Campaign Workers

The weekend before the election, the candidate should make personal telephone calls to key campaign workers. This is a time for the candidate to make and ask for observations, to exchange ideas and assessments, to admit fatigue, and to acknowledge that the key workers must also be exhausted. It is the time to express thanks as well as to confide that he or she is grateful that the campaign is almost over. It is a time to recognize that win or lose, there has been a shared articulation of ideas and philosophy, and the establishment of a platform that sets a cause and a goal--improvement in the schools. The candidate should emphasize that the "team effort" has been the key to the campaign thrust and is fully appreciated. This realization that it takes the combined efforts of the candidate, the campaign manager, the chairpersons, and the many campaign workers to mount a winning campaign should be stressed by the candidate during these telephone calls, in a letter addressed to all workers before the walkathon (see sample literature in Chapter 3), at the victory party, and in the thank-you notes following the election.

The Wrap-Up

The Victory Party

It is customary for the candidates, their families, and a group of supporters and friends to await the results of the election returns at the board of education offices. The votes are usually posted on a large blackboard as they are called in. If it is anticipated that the vote will be close, great interest is shown in the absentee ballot numbers, as these sometimes make the difference between winning and losing. It is now that the absentee ballot chairperson will have concrete proof of the importance of his or her job. As the results become known, winners, losers, and

supporters congratulate, commiserate, and discuss the outcome of the voting.

Party preparation. The candidate, the candidate's spouse, members of the campaign committee, or friends of the candidate organize the victory party. The party is often held at the candidate's home, or some other convenient location. And the candidate often foots the bill. This is the candidate's thank you, win or lose.

Ten days before election day, a handwritten letter of thanks written on quality notepaper should be sent to every campaign supporter (chairpersons, neighborhood gathering host families, financial contributors, telephoners, walkers, letter writers, etc.) This note also serves to invite the workers and his or her spouse to the victory party. Place and time (usually after the polls close) should be specified. The note should be signed by the candidate, even though the candidate did not have time to do the actual letter-writing. Names and addresses of campaign supporters can be obtained from the campaign manager, who has instructed committee chairpersons to keep accurate, updated lists of all workers.

Shopping for the party should include procuring paper napkins, paper cups and glasses, and ordering food and drink according to an agreed-upon party format. This can range from very simple (punch and cookies) to fairly simple (wine, cheese, coffee, cookies), to elaborate (wine, open bar, hot buffet, dessert, coffee, tea). The organizers will do the marketing and will be joined before the party by friends of the candidate, who will help set things up. These friends will also remain for the postparty cleanup.

During the party. The candidate should make a short speech thanking all supporters for their time and contributions. At some point during the evening, the candidate may wish to thank chief campaign workers individually. Personal thank-you notes to these key supporters should be written by the candidate later.

After the party. In some states, leftover campaign funds may be spent on the victory party. Other states require leftover campaign funds to be disposed of in other ways. Check your local board of elections for information.

The Postcampaign Analysis

This detailed review is done in the context of a potluck or coffee-

dessert luncheon given by the campaign manager a week or so after the election. The purpose of this meeting is to thank the chairpersons as well as to examine the campaign effort. The campaign manager asks each chairperson to write a report of her or his committee's work, with an evaluation of the effectiveness, or ineffectiveness, of the group. Observations on how to improve or what to discard of the committee's work are valuable for future efforts. A complete list of all workers and samples of all printed materials should be provided by each chairperson.

Note: Since electing candidates who are concerned with quality education is an ongoing need, having a proven mechanism for achieving this goal is both practical and time-saving (there is no need to reinvent the wheel in the course of every campaign). The individual needs of each community will become apparent if good record-keeping is employed. This includes the pinpointing of those districts voting heavily for a given type of candidate and those voting heavily against such a candidate. The latter areas will be soft-pedaled next time. The campaign manager should keep the material that has been pooled at the postcampaign analysis for future reference. Good record-keeping is rare; its importance, however, cannot be overemphasized.

The Time Frame: Candidate's Schedule Week by Week*

The following schedule is a sixty-day campaign* plan which has proved to be successful in a number of campaigns. This is the *least* amount of time a novice candidate will need to do the things outlined in this book. Some candidates may not need to spend this much time because they are already well informed about school matters. If you have the luxury of time and staff, this schedule can be extended to a ninety-day plan or longer. The more time a candidate has to prepare a campaign, the better.

Week 1. Prepares biographical statement. Has campaign photograph

*What is described here does not include time the candidate may devote to planning, study and discussions *before* announcing his/her candidacy.

taken. Meets with campaign manager. Attends board of education meeting (if any) and asks questions, if appropriate. Makes appointments to see: parent organization presidents, school principals (elementary, junior and senior highs), the superintendent of schools, assistant superintendent of schools, and school department heads. Takes notes at all meetings. Reads research materials.

Week 2. Writes pre-announcement letter. Meets with campaign manager. Makes telephone calls to friends, neighbors, associates. Makes appointments to see: present board members, selected former board members, other community members with influence and expertise. Takes notes. Attends board of education meeting (if any) and asks questions. Continues reading research material. Reads board of education minutes. Attends first briefing. Attends all-committee meeting and gives a report on personal view of the status of the campaign.

Week 3. Meets with campaign manager. Attends board of education meeting (if any) and asks questions. Continues reading research material. Attends second briefing. Writes the platform and formulates the public presentation, based on research material, visits, interviews, analysis of strengths and weaknesses of the system, personal philosophy, recommendations, and own feeling about the direction the system should take. Tests emerging presentation with campaign manager. Writes letter to committee chairpersons and early supporters. Signs filing petition.

Week 4. Meets with campaign manager. Again tests presentation with campaign manager plus three to four chairpersons. Attends board of education meetings (if any) and asks questions. Attends kick-off party and gives first public presentation. Neighborhood gatherings begin. If door-to-door campaigning is going to be done, some of the neighborhood gatherings should be omitted.

Week 5. Follows campaign schedule, i.e., neighborhood gatherings, board of education meetings. Meets with campaign manager.

Week 6. Follows campaign schedule, i.e., neighborhood gatherings, school budget hearing if scheduled at this time (asks questions); public forums (prepares answers to questions). Attends all-committee meeting and gives a report on personal view of status of the campaign. Has interview with newspaper editor for possible editorial endorsement. Has interviews with school newspaper and local shoppers. Meets with campaign manager.

Week 7. Follows campaign schedule, i.e., neighborhood gatherings, public forums (prepares answers to questions). Writes letters to campaign workers. Meets with campaign manager.

Week 8. Follows campaign schedule, i.e., neighborhood gatherings, public forums (prepares answers to questions). Has newspaper interview for board of education feature. (Newspapers will often run an article presenting all candidates to the public during this week, giving their platforms, their issues of chief concern, and their qualifications.) Writes letter to campaign workers. Speaks at walkathon "get-out-the-vote" meeting (see Chapter 2).

Week 9. Follows campaign schedule, i.e., neighborhood gatherings. Telephones chairpersons. Votes on Election Day. Hosts victory party. Writes thank-you notes to key campaign workers.

Week 10. Participates in postcampaign analysis.

All candidates do not have to do all of these things in order to be elected. A candidate must pick and choose the techniques that best apply to his or her own situation. A less intense effort will suffice if the candidate has a more extensive background in school affairs. A different emphasis might be needed in small towns or rural districts. All candidates, however, will get some helpful hints and guidelines from the above information.

Chapter 2
The Campaign Organization

The campaign organization is composed of committee chairpersons and volunteers coordinated by the campaign manager, who is the key worker in the campaign effort. The campaign manager delegates tasks to the appropriate chairpersons in accordance with his or her campaign strategy or campaign plan.

Suggested committee chairpersons are as follows (not all campaigns will need this many chairpersons; make the appropriate adjustments to suit your campaign strategy):

Absentee ballots chairperson
Aides chairperson
Briefings chairperson
Clerical chairperson
Finance chairperson
Letters-to-the-editor chairperson
Letters-to-friends chairperson
Mailings chairperson
Neighborhood gatherings chairperson
Publicity chairperson
Research chairperson
Telephone "get-out-the-vote" chairperson
Walkathon chairperson

The function of each is described in detail in the following section.

Scope of the Campaign Organization

The scope of the campaign organization will be determined by the particular needs of a given community, the nature of the race, and the

issues involved. *Some campaigns will warrant an organization employing the entire gamut of committees described in this guide. Others may call for a much smaller format.* Whatever the scope of the campaign, its two vital elements are:

- A candidate who is well prepared and recognized as "high quality."
- A campaign organization directed by a campaign manager equipped with a strong operational plan.

In any campaign, it is important for all those involved to remember that because of the critical importance of the schools and because the largest portion of local real estate taxes are used to operate the schools, school board elections, although usually nonpartisan, are often closely contested. Thus, a well-coordinated effort is essential for the candidate's election.

Campaign Directory

In order to facilitate communication within the organization, a campaign directory is established as quickly as possible by the publicity chairperson. It contains the names and phone numbers of the campaign manager and of all committee chairpersons, and serves as a valuable reference tool.

Sample Campaign Directory

CAMPAIGN COMMITTEE FOR JOHN DOE
One Main Street
(phone number)

Campaign Manager: (Name) (Phone)

THE COMMITTEE TO ELECT JOHN DOE

Chairpersons	Chairperson's Name	Phone Number
Absentee ballots		
Aides		
Briefing		
Clerical		
Finance		

Chairpersons	Chairperson's Name	Phone Number
Letters-to-the-editor		
Letters-to-friends		
Mailings/literature drop		
Neighborhood gatherings		
Publicity		
Research		
Telephone "get-out-the-vote"		
Walkathon		

Campaign Headquarters

Campaign headquarters is, in effect, wherever the campaign manager happens to be, since he or she is the nerve center of the campaign and projects the campaign image. Since the campaign manager must have tight control over all printed matter, that material is kept in his or her home. Duplicating machinery or easy access to a commercial source is important in keeping work flowing on schedule. As the committee chairpersons come and go, picking up material and instructions, a natural exchange of ideas, thoughts, and information takes place. This is part of the interaction needed for a highly committed campaign effort.

The other physical site where a "headquarters" is established is at the home of the telephone "get-out-the-vote" chairperson. It is here that the telephoning, phone polling, and record-keeping is done and that a sense of camaraderie is generated and maintained.

Note: Throughout the campaign, the campaign letterhead should contain the names of representative community members, including all committee chairpersons, important campaign supporters, and spokespeople for diverse interest groups. These names should be listed at the side or on the bottom of the letterhead.

The Campaign Manager

Board of education candidates usually appear on the election ballot without party designation and are often not only apolitical but totally

unaware of the needs of a campaign effort and what it takes to win. The campaign manager must know what it takes to win.

In volunteer elections, the campaign manager must be satisfied that the candidate is intelligent and can stand up to public scrutiny, and that the manager and candidate share common philosophical convictions. During the campaign, they will share a responsibility and a schedule that is equally demanding.

The campaign manager must have the complete trust and confidence of the candidate and must have authority for making decisions concerning the running of the campaign organization (see Chapter 1). It is essential that the campaign manager maintain perspective and objectivity throughout the campaign.

The campaign manager must know how to effectively use the three basic campaign resources: manpower, time, and money. Such resource management requires judgment, foresight, political sense, and above all detailed planning.

The campaign manager must be responsible for the strategy of the campaign, and must understand how the voter is motivated to reach a decision.

The campaign manager is the person who will be blamed when things do not work or do not work smoothly. The candidate rather than the campaign manager reaps the rewards of success. To stand up to the rigors of the job, the campaign manager must be highly committed to the cause being served. With such commitment, this complex and difficult job becomes a challenging and remarkably rewarding opportunity for community service.

Qualifications

The campaign manager's qualifications include knowledge of the local school situation, ability to read the public mood, capacity to build an efficient, effective organization with a group of volunteers who can produce under the great tension and pressure of a short campaign effort, and the ability to inspire and oversee the entire campaign organization. (For more about qualifications, see "Selecting a Campaign Manager" in Chapter 1.)

Time Required

The campaign manager must be able to work daily on the campaign effort. Time involved would normally be from twenty to fifty hours a week, but the campaign manager must be prepared to be constantly on call.

Duties

The campaign manager will do the following:

1. Direct the candidate preparation.
2. Offer solid advice and constructive criticism on general issues and philosophy to the candidate.
3. Help the candidate express his or her own personality.
4. Help the candidate avoid mistakes.
5. Recruit and train the key campaign staff.
6. Schedule the campaign.
7. Define the campaign budget.
8. Create a campaign strategy.
9. Review and edit all campaign literature; work closely with publicity chairperson to implement the publicity effort.

In sum, the campaign manager will act as the nerve center of the campaign, i.e., understand it, plan it, direct it, coordinate it, correct it, reorganize it, supervise it, delegate it, even eliminate it, if necessary.

Weekly Time Frame

This, like the other time frames, is based on an intensive, sixty-day campaign plan. *The elements in this plan should be adjusted according to what is needed in your community.* Many campaign managers do not have the time or budget, or feel the need, to accomplish this many tasks.

Week 1, forty-fifty hours. Examines the political climate of the community. Determines intensity of campaign effort needed to win. Recruits chairpersons. Develops strategy.

Meets with candidate and establishes clear lines of responsibility. Defines preparation needs and gives candidate a preparation schedule. Meets individually with the following chairpersons: briefing, neighborhood gatherings, finance, publicity, research, and telephone "get-out-the-vote." Gives each an overall view of the campaign needs, stressing how

important each committee's efforts are, providing a job description of required tasks, and setting up a schedule. Keeps in touch with the candidate and the above chairpersons on a daily basis to check on progress and identify needs. Sets dates for briefings, all-committee meetings, and the kick-off party. Organizes the first all-committee meeting.

Week 2, forty-fifty hours. Meets with candidate. Conducts all-committee meeting. Listens to reports and answers questions. Meets individually with and instructs/trains the following chairpersons: absentee ballots, aides, clerical, letters-to-the-editor, letters-to-friends. Obtains candidate petition from board of education offices, collects signatures, files the petition. Reviews all written material to be printed. Checks progress with all. Checks biographical statement.

Week 3, thirty-forty hours. Meets with candidate. Speaks with all chairpersons. Monitors progress, adjusts. Individually meets with and instructs mailings/literature drop chairperson. Briefings begin. Analyzes progress of candidate, helps adjust. Listens to initial presentation, comments and adjusts. Calls forum sponsors, clears dates. Participates in campaign presentation with three to four chairpersons. Checks campaign photograph, draft of platform, and draft of brochure. Reviews letter to committee chairpersons and early supporters.

Week 4, thirty-forty hours. Meets with the candidate. Meets with the chairpersons as needed. Reviews platform, brochure, fund drive letter. Participates in final test campaign presentation with three to four chairpersons. Checks progress of phone polling. Readies kick-off party.

Week 5, twenty-thirty hours. Meets with the candidate. Meets with the chairpersons as needed. Speaks to all chairpersons. Attends board of education meetings, selected neighborhood gatherings, and speaks with supporters and others in all districts to maintain an accurate reading of the community's political climate. Such contact is a weekly, ongoing need for the campaign manager, giving the needed "feel" for the progress of the campaign. Finalizes first newspaper ad.

Week 6, twenty-thirty hours. Meets with the candidate. Meets with the chairpersons as needed. Speaks with all to check on progress. Adjusts where necessary. Meets with and instructs walkathon chairperson. Organizes and conducts all-committee meeting. Listens to reports and answers questions. Attends public forums. Begins to tabulate phone

polling results with telephone "get-out-the-vote" chairperson. May call a fund drive meeting if needed to reorient or reorganize fund-raising effort. Finalizes second newspaper ad.

Week 7, twenty-thirty hours. Meets with candidate. Meets with chairpersons as needed. Continues tabulating phone polling results. Checks on progress of townwide mailing effort or townwide literature drop if townwide mailing is too costly. Helps proofread galleys of first newspaper ad.

Week 8, thirty-thirty-five hours. Meets with candidate and all committee chairpersons. Helps proofread galleys of second newspaper ad. Helps prepare the "get-out-the-vote" and walkathon efforts. Delegates invitation to victory party task (probably to neighborhood gatherings chairperson). Makes brief speech at Saturday morning rally, thanking, reassuring, urging on.

Week 9, twenty-thirty hours. Speaks with candidate and chairpersons. Votes. Attends victory party.

Week 10. Conducts postcampaign analysis. Collects all data to keep for future use.

Campaign Resources

In discussing the three campaign resources, it should be stressed that, however significant, manpower, time, and money alone will not ensure a winning campaign. Only when incorporated in a well-researched campaign strategy will they get the desired results.

Manpower. People are the campaign organization. How effective the campaign manager, the candidate, and the cause are in attracting people to the campaign to work and vote for the candidate is what the campaign is all about. From voters, to workers, to committee chairpersons, the campaign manager must constantly remember that all are volunteers in behalf of our children's education.

The campaign manager must seek out volunteers subtly but professionally. Citizens invited to participate in the campaign should be made to feel that the request is a compliment to the volunteer's sense of commitment. *Once enlisted, a volunteer should never be taken for granted.* It is the job of the campaign manager to keep workers aware of their importance, to always find time to thank, to alleviate the tedium of envelope stuffing and telephoning with a reminder to workers that the

Campaign Plan

60 Day Plan 1984	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Week 1	Feb. 10 Candidate-Campaign Manager Meeting	11 Candidate	12 Candidate-Campaign Manager Meeting	13	14 Candidate-Campaign Manager Meeting	15	16 Candidate Campaign Manager Meeting
	Daily			Candidate preparation			
	Daily			Campaign Manager meets with Chairs, writes, phones, instructs			
		Board of Education Meeting					
Week 2	Feb. 17	18	19 Candidate-Campaign Manager Meeting	20	21 All-Campaign Committee Meeting	22	23 Candidate-Campaign Manager Meeting
	Daily			Candidate preparation			
	Daily			Campaign Manager meets with chairs, writes, phones, instructs			
Week 3	Feb. 24	25	26	27 Letter from Candidate to Committee Chairs & early supporters	28	29 Deadline for filing	March 1 Candidate-Campaign Manager Meeting Test presentation
	Daily			Candidate preparation			
		Pre-announcement Letter					
	Daily			Campaign Manager meets with chairs, writes, phones, instructs			
	Briefing #1	Board of Education Meeting		Briefing #2			
Week 4	March 2 Newspaper announcement Letters to Editors Test presentation Campaign Manager +3-4 Chairs	3 Telephoning begins Candidate preparation continues Campaign Manager oversees	4	5	6 Completed all Letters to Editors	7 Letter from Candidate to Chairs & early supporters Kick-off party	8 Candidate-Campaign Manager Meeting Neighborhood Gathering

Week 5	March 9 Letters to Editors Neighborhood Gathering	10 Board of Education meeting	11 Neighborhood Gathering	12 Fund Drive Letter Neighborhood Gathering	13 Letters to Editors Neighborhood Gathering	14 Neighborhood Gathering	15 Candidate-Campaign Manager Meeting
Week 6	March 16 Letters to Editors Neighborhood Gathering	17 School Budget Hearing	18 Letters to Friends, 1000+ Neighborhood Gathering	19 Neighborhood Gathering	20 Letters to Editors Republican Club Forum	21 Neighborhood Gathering	22 All-Campaign Committee Meeting
Week 7	March 23 Letters to Editors Parochial School Forum Neighborhood Gathering	24 Neighborhood Gathering	25 Neighborhood Gathering	26 Townwide Selected Mailing Parent Organizations	27 Letters to Editor Neighborhood Gathering	28 Neighborhood Gathering	29 Candidate-Campaign Manager Meeting or Townwide Lit Drop
Week 8	March 30 Letters to Editors Newspaper ad Neighborhood Gathering	31 League of Women Voters Forum	April 1 Neighborhood Gathering	2 Letter from Candidate to Campaign Workers 3:30 Teachers Forum Neighborhood Gathering	3 Letters to Editors Newspaper ad. Decoratis Club Forum	4 Neighborhood Gathering	5 Walkathon Get-Out-the-Vote Rally & Walkathon
Week 9	April 6 Get-Out-the-Vote Complete "Walkathon" Letters to Editors Newspaper ad Neighborhood Gathering Neighborhood Gathering	7 Get-Out-the-Vote Neighborhood Gathering	8 Get-Out-the-Vote Election Day -Board of Education Victory Party Party at at Candidate's home	9 Call Chairs—make date for post-election lunch-analysis			
Week 10		Attend Post-Campaign Analysis					

campaign could not exist without its volunteers.

Time. Since the campaign effort is limited to a certain number of weeks, careful scheduling is of the essence. The campaign manager must draw up both an overall campaign schedule, which serves as the master plan; a candidate's schedule; and individual, integrated schedules for each commitee chairperson.

Candidate preparation, coupled with the recruiting and training of committee chairpersons, consumes about the first twenty days of the campaign. By the end of Week 4 of a sixty-day campaign, all committee chairpersons must be following their schedules. As the campaign progresses, the campaign manager monitors all schedules and adjusts them as the campaign strategy dictates.

Money (budget). As early as possible, the campaign manager will establish a tentative budget, which will then be reviewed with the finance chairperson. It is very important to check your state's laws regarding campaign finance—they are very complicated in some states.

The budget should set a dollar goal, which is based upon amounts spent in previous elections, keeping in mind inflationary trends. The strategy is to acquaint the citizen/voter with the candidate, not to create a splashy effect. Indeed, lavishness in campaign literature and other aspects of the campaign turns off voters.

For smooth and efficient operation, clear monetary guidelines must be set up early in the campaign. A working model follows:

Guidelines:

1. No chairperson is to exceed his or her appropriation without the consent of the campaign manager.
2. A contingency provision must be included in the basic budget (10 percent is suggested).
3. Chairpersons are expected to obtain two or more bids or estimates for major jobs such as the printing of brochures. These will be submitted to the campaign manager.
4. Contributors are likely to vote; thus the goal is to come up with as many contributors as possible.

Estimated Fund Drive Needs (based on a town with a 27,000 person population, 7,000 households, and 6,200 students—if you have as

comprehensive a campaign as the one spelled out in this guide):

1. Telephone*	Three phones	$ 150
2. Mailings	Townwide	750
	Selected	150
	Finance chairperson	200
	Thank-you notes	50
	Absentee ballots	50
3. Printing	Letterheads and envelopes for mailings, fund drive, etc. Brochures, art, and layout	
	Thank-you notes, file cards	1,500
	Voter labels	60
4. Advertisements in newspapers (2)		
	Local Sunday paper	250
	Local daily paper	200
5. Miscellaneous		50
6. Contingency		250
	TOTAL	$3,660

This is a great deal more than many school board candidates spend on their campaigns. In many districts, $600 or less may be sufficient to mount a winning campaign.

Strategy (The Campaign Plan)**

A flexible but consistent campaign strategy is essential to a successful campaign. To develop a winning strategy, the campaign manager must be able to translate information about the community, the candidate's makeup, and the issues into an effective action plan.

The first task involved in designing the campaign plan is research. The campaign manager must be as informed as possible in the following areas, pinpointing problems, patterns, and needs:

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*Often, contacts with access to phone bank (business, labor, etc.) will donate phones.

**Refer to chart on pages 32 and 33.

Nature of the Community

Values (what citizens expect of the schools)
Geography
Major social and economic arrangements
Political subunits
Previous political behavior (voting habits)

The level of potential and actual political activism of the citizenry. (In most communities, the level of participation is low but because school elections concern the future of our children, the public can be activated by a strong campaign organization.)

It is vital that the campaign manager go over the above information with the candidate so that he or she also understands the nature of the community and will not be out of touch once elected.

The Candidate's Makeup

Personality
Appearance
Preparation (degree of)
Speaking skills
Qualifications
Previous community involvement
Nature of opposition (personality, skills, etc.)

Incumbency (this is usually a plus, unless there has been great divisiveness of the board, or the citizens are unhappy with the incumbent's performance.)

The Issues

Candidate's issues
Opposition's issues
Concerns of the electorate

The importance the voter attaches to the issues must be assessed as well as the citizenry's capacity to differentiate between issues and candidates. Some issues of concern to the electorate are highly visible (e.g., deficiencies in the reading, athletic, or music program); others are hidden (e.g., religious and racial concerns).

If the research is properly done, the campaign manager will now be able to answer such questions as:

- Is this a hotly contested election?
- Is the present school administration and staff viewed as adequate, inadequate, or superior?
- What, if any, are the local interest groups and/or pressure groups?
- Where does the money come from to support the schools?
- Does the candidate have a built-in base of supporters?
- How many votes will it take to win (based on past elections)?
- How many individuals must be contacted at neighborhood gatherings, through phone polling, public forums, literature drops, mailings, and the walkathon?

The campaign manager is now ready to move on to task 2 of the planning effort, the meshing of resources and perceived needs. This involves:

1. Analyzing the campaign resources (manpower, time, and money) that are available for the campaign.
2. Choosing the tasks that should be accomplished to run a successful campaign, and picking the chairpersons.
3. Organizing the tasks in a way that will give them maximum impact.

The third and final step in creating a campaign strategy is to use the information gathered above to create a visible action plan, a calendar that will become the schedule for the campaign. The campaign manager should:

1. Take a large sheet of paper and square off the number of days until the election.
2. Starting with election day, work backwards, answering the questions how to campaign and where by reviewing the campaign tools available and choosing those most appropriate to campaign needs and potential. For example:
   - Are twenty or thirty neighborhood gatherings required/feasible?
   - Do funds warrant a mailing or is a literature drop indicated?
   - Are there enough volunteers for a walkathon?
3. Develop the plan until each daily square is filled in.

Strategy Checklist

Aims and Tasks

What we are going to do:

- Organize a campaign to put John Doe on the board of education.

Resource: Campaign Manager

- Identify John Doe and provide all biographical and other information pertinent to his successful campaign.

Candidate

Why we are campaigning for John Doe:

- Present the issues that John Doe represents.

Resources: Candidate
Briefings chairperson
Mailings chairperson
Neighborhood gatherings chairperson
Public forums
Publicity chairperson
Research chairperson
Telephone "Get-out-the-vote" chairperson

How we will go about creating a successful campaign:

- Introduce the candidate to the public in the most favorable way:

Resources: Public forums
Letters-to-editor chairperson
Letters-to-friends chairperson
Mailings chairperson
Neighborhood gatherings chairperson
Publicity chairperson
Walkathon chairperson

- Inform the public of the candidate's opinions and stand.

Resources: Public forums
Letters-to-editor chairperson
Letters-to-friends chairperson
Mailings chairperson
Neighborhood gatherings chairperson
Publicity chairperson
Walkathon chairperson

- Provide adequate communication with the public; both directly and indirectly.

Resources: Public forums
Letters-to-editor chairperson
Letters-to-friends chairperson
Mailings chairperson

Neighborhood gatherings chairperson
Publicity chairperson
Telephone chairperson
Walkathon chairperson

- Stimulate voter interest and turnout.

Resources: Absentee ballots chairperson
Public forums
Letters-to-editor chairperson
Letters-to-friends chairperson
Mailings chairperson
Neighborhood gatherings chairperson
Publicity chairperson
Telephone chairperson
Walkathon chairperson

Who will work to achieve these aims:

- Recruit volunteers to staff organization.

Resources: Campaign manager
Candidate

- Fill staff positions.

Resource: Campaign manager

The Committee Chairpersons

The committees are the units within the campaign organization that perform the tasks needed to elect the candidate. A thorough understanding of the role and duties of each is essential in planning a winning campaign.

For quick reference, the committee chairpersons are presented here alphabetically. They are all of equal importance, working directly under the campaign manager. None works in isolation. Indeed, as the campaign develops, their functions tend increasingly to overlap. Thus, a constant monitoring of information by the campaign manager and the processing of that informational pool through the campaign network is needed to facilitate maximum interaction and to ensure an efficient, effective campaign.

It should be noted that in shaping an individual campaign organization

based on a personal strategy, decisions concerning which tasks are indispensable to the campaign and which tasks are of intermediate need must be made. The campaign manager should exercise his or her judgment about the scope and the thrust of campaign effort, consult with the candidate and key committee chairpersons, then scale the material that follows accordingly. *In some campaigns, fewer people might be needed and fewer or different tasks might need to be accomplished.*

Absentee Ballots Chairperson

The absentee ballots chairperson will help ensure that no voter is denied the opportunity to vote because of absence from the district or inability to reach the polls on election day. The chairperson will do this by identifying prospective voters and seeing that they receive absentee ballots in time for filing. In some elections, absentee voters can make the difference between a candidate winning or losing.

Qualifications. Willingness to inform oneself of the rules governing absentee voting; the follow-up skills required to get absentee ballot request forms to appropriate voters and committee chairpersons promptly; the capacity to come up with lists of absentee voters in targeted categories and to draft initial and follow-up letters (see sample letter and sample follow-up letter to absentee voters in Chapter 3) urging those voters to request absentee ballots and to vote for the candidate.

Staffing needs. The committee chairperson can handle this job alone.

Time required. Approximately twelve to sixteen hours.

Duties: The absentee ballots chairperson will do the following:

1. Become familiar with the absentee voting laws. The necessary information can be received from local election officials.

2. Obtain copies of absentee ballots request forms from the secretary to the local board of education. These forms should be duplicated for distribution (several hundred copies). It is the responsibility of the chairperson to replenish the stock of forms as needed.

3. Supply the telephone chairperson with copies of absentee ballot applications. Telephoners will routinely ask if the applications are needed and will mail them out directly.

4. Supply the aides chairperson with copies of absentee ballot

applications for inclusion in the candidate information packets distributed at neighborhood gatherings and at public forums.

5. Depending on the strategy of the campaign, compile lists of groups of potential voters targeted to receive special mailings. Group categories include: traveling business people, college students (often new voters), vacationers, and senior citizens. It is helpful in reaching the first of these groups to request the prior year's list of absentee voters from the board of elections. Traveling business people often vote consistently by absentee ballot. College students may be reached through lists of names and addresses of seniors who graduated the previous June. These lists may be available at local high schools. (In light of increasing sentiment to avoid invasions of privacy, local school districts may have policies that do not allow this.) Vacationers may be pinpointed through personal information or hearsay, and senior citizens may be identified by contacting local senior citizen clubs and requesting membership information.

6. Identity an individual within the targeted groups who is willing to write or endorse a letter to his or her friends or associates on behalf of the candidates, urging them to request absentee ballots and vote. Personalizing the letter to the targeted groups is an effective tool in the vote-getting plan. The letter may be reinforced by a follow-up letter a week or so later. The chairperson may offer a letter to the endorser (see sample letter to absentee new voters in Chapter 3), or the endorser may wish to write on his or her own. All special interest letters should be coordinated and mailed by the chairperson.

7. Submit all written materials to the campaign manager and publicity chairperson for editing and/or review.

Weekly time frame based on a sixty-day campaign

Week 2: Meets with campaign manager to receive instruction and overview of campaign needs. Obtains and studies absentee ballots. Makes duplicate copies (for about 15 percent of registered voters). Attends all-committee meetings and makes report.

Weeks 3, 4: Writes brief summary of requirements and deadlines. Distributes these to telephone and aides chairpersons. Attends kick-off party. Identifies individuals within targeted groups. Asks that they write or endorse a letter to their associates and friends.

Weeks 5, 6, 7, 8: Checks with telephone and aides chairpersons about

their ballot needs. Makes and delivers additional copies if needed. Attends all-committee meeting (sixth week) and makes report.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Aides Chairperson

The aide is a campaign volunteer who accompanies the candidate to neighborhood gatherings, public forums, and other public appearances. A good aide acts as a buffer between the candidate and the voters, removing pressure from the candidate without interfering with or speaking for him or her.

The aides chairperson recruits aides, supplies them with written materials, trains them, and coordinates their activities.

Qualifications. The ability to search out, teach, and schedule workers and provide them with written guidelines. An easiness with people in social situations.

Staffing needs. Up to a dozen aides, depending on intensity of the campaign.

Time required.

Recruiting and scheduling aides	3-6 hours
Developing aides packet of materials	2-4 hours
Training the aides	2-4 hours
Coordination of candidate appearances per time slot (Sunday 1-3 p.m., Monday 10-12 a.m., etc.)	2 hours overall for each

Duties. The aides chairperson will do the following:

1. Recruit and schedule the aides. The chairperson will receive a complete campaign schedule from the campaign manager and will schedule aides accordingly. Aides should be recruited from as wide a geographical distribution as possible, and each aide should be delegated to the same time slot as frequently as possible (all Sunday afternoons, for example). Where possible, have as few people do as many neighborhood gatherings as possible. This gives the aide a better overview of how the candidate is being received, as well as a better feel for the tone of the questions posed.

2. Develop the aides packet of materials and ensure that the aide has a sufficient supply of literature for each function attended. It is the chairperson's responsibility to deliver complete packets to the aides before all scheduled events. The packets, which are brought by the aide to neighborhood gatherings and public forums, should contain:

- The day's schedule: time, place, telephone number of appointments.
- An attendance sheet (for use by the telephone chairperson).
- A sign-up sheet for new workers (for use by the campaign manager).
- Cards or a sign-up sheet for prospective endorsers (for use by the campaign manager).
- A form on which to note names and addresses of contributors and amounts pledged (for use by the finance chairperson).
- Absentee ballot request forms.
- An aides report form (for use by the campaign manager).
- Sample introduction and closing remarks sheets (see aides sample literature in Chapter 3).
- Campaign literature, including brochures, flyers, voter information sheets (see neighborhood gatherings sample literature in Chapter 3), and biographical information.

3. Train aides by:

- Familiarizing them with the candidate's stand on the issues.
- Teaching them how to introduce the candidate to groups and how to close meetings.
- Teaching them how to make fund-raising pitches and solicit endorsements and workers.
- Generating an aides instruction sheet and sample opening and closing remarks sheet for inclusion in the aides packet.

4. Be prepared to cover for aides who cannot fulfill their time commitment. In the event that the chairperson cannot attend the function in question or find a last-minute replacement, the campaign manager should be consulted for help.

5. Review materials turned in after neighborhood gatherings by the aides and channel lists and information to proper chairperson.

6. Submit all written materials to campaign manager and publicity chairperson for editing and/or review.

Weekly time frame based on a sixty-day campaign

Week 2: Meets with campaign manager to receive instruction and overview of campaign needs. Begins recruiting aides by telephone. Writes aides instruction sheets and has them duplicated. Receives initial neighborhood gatherings schedule. Makes list of items that will comprise aides packet of materials. Attends all-committee meeting and makes report.

Week 3: Obtains updated neighborhood gatherings and public forum schedules. Begins scheduling aides.

Week 4: Gets latest schedule for neighborhood gatherings, public forums. Scheduled aides. Assembles aides packet of material. Meets with aides individually or as a group. Attends kick-off party.

Week 5: Schedules any new volunteers. Completes aides scheduling. Checks with aides for appraisal of and reaction to neighborhood gatherings they have attended.

Week 6: Attends all-committee meeting and makes report.

Weeks 7, 8: Continues checking with the aides. Asks if supplies needed.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Aides

Qualifications. The ability to speak spontaneously in public, i.e., introduce candidate and solicit contributions and workers; the capacity to mingle with people gracefully and enjoy it, while keeping a low profile.

Time required. About two hours per candidate appearance.

Duties. The aides will do the following:

1. Accompany the candidate to all functions.
2. Bring aides packet to the event and place sign-up sheets and literature in visible places.
3. Mingle with the attendees.
4. Decide with host or hostess who will introduce the candidate.
5. Introduce the candidate if so decided.
6. Listen critically to the candidate's presentation and evaluate the audience reaction for inclusion on the aides report form.
7. Be prepared to ask the first question during the question-and-answer period if no question is forthcoming from the audience. Have additional questions ready for lulls in the interchange or for use should it seem

necessary to change the trend of the discussion.

8. Conclude the presentation (when it appears that all reasonable questions have been asked or after about forty-five minutes) with an appeal for endorsement, people to host neighborhood gatherings, workers, and funds. Call attention to the sign-up sheets, absentee ballot requests, and campaign literature. Thank all those in attendance for their support. Remind about the date and hours of election.

9. Collect all sign-up sheets and unused materials.

10. Take candidate home if so decided—discuss any significant ideas or comments relative to the presentation.

11. Fill out aides report form, including comments on how the candidate was received, effectiveness of presentation, and a list of all persons present to whom the aide will be giving a thank-you call.

12. Deliver sign-up and other lists to campaign manager for review and channeling.

13. On day after the function, telephone the host family and any other persons who contributed time, money, or services to the event and thank them in the candidate's name.

Weekly time frame based on a sixty-day campaign

Week 4: Meets with aides chairperson for instruction, scheduling, and to learn how to use contents of aides packet. Attends kick-off party.

Weeks 5, 6, 7, 8: Attends neighborhood gatherings with candidate.

Weeks 7, 8: Attends public forums with candidate.

Week 9: Attends final neighborhood gatherings with candidate. Votes. Attends victory party.

The Briefing Chairperson

In preparing the candidate to meet the voters, two briefing sessions should be scheduled, the first about two weeks after the candidate preparation begins, the second three or four days later. These simulations will enable the candidate to assess how he or she will act under the pressure of tough questions during public appearances. The sessions will also test the candidate's ability to answer or field questions (in the latter case, knowing when to say "I don't know the full answer right now, but I'll

get back to you.") The briefings will further help to identify areas where candidate preparation remains incomplete.

The briefing chairperson will be responsible for arranging the two important test encounters with the candidate and for pinpointing strengths and weaknesses in the candidate's body of knowledge.

Qualifications. A good knowledge of the overall problems, assets, and needs of the school system; the ability to define these needs in categories and to assign general as well as specific areas of questions to the briefing aides.

Staffing needs. Five to six aides.

Time required. Eight to twelve hours.

Duties. The briefing chairperson will do the following:

1. Recruit community members well versed in school affairs to be aides.

2. Ask each aide to draft fifteen to twenty questions that are difficult and pertinent, in such areas as budgeting, special education, and tenure qualifications. The following are examples of the kinds of questions that might be asked:

- How much state aid do we receive now? What is it used for?
- Could you describe the range of programs available in the schools for non-college-bound youngsters?
- What do you propose to do to better inform the taxpayer of the work of the schools?
- Do you support the tenure concept? In what ways will you propose its modification?
- What constitutes a quality school system?
- Do you think we do enough for the gifted child?
- What do you think of the state assessment testing program?
- What drug-related problems are there at the high school and what is the responsibility of the school and of the parent in each case?
- Would you describe the social studies curriculum used in the local schools and give us your opinion of its effectiveness?

3. Schedule time and place for the briefing sessions in conjunction with the campaign manager.

4. Attend both briefing meetings and take notes for use in analyzing the candidate's strengths, weaknesses, and style.

5. Tape briefings for further analysis.

Weekly time frame based on a sixty-day campaign

Weeks 1, 2: Meets with campaign manager at onset of campaign for instruction and overview of campaign needs. Having established the issues and the areas of expertise required, contacts community members knowledgeable in special education, economics, legislation, athletics, etc., and asks each of these briefing aides to draft questions in their fields for the briefing sessions. Attends first all-committee meeting and makes report.

Week 3: Attends the two briefings and takes notes on candidate's replies to questions. In collaboration with aides, helps evaluate these responses, pinpointing areas in which the candidate needs further preparation. Writes a short summary of the briefings. Assembles all new information emerging from the session for the candidate. Reviews tapes of briefings, if any.

Week 4: Attends kick-off party.

Week 6: Attends all-committee meeting and makes report.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Briefing Aides

Qualifications. A solid body of knowledge in school-related issues.

Time required. Four to six hours.

Duties. The briefing aides will do the following:

1. Draft questions.
2. Attend the two briefing sessions.
3. Participate in the analysis process.
4. Provide replies to difficult questions the candidate is unable to answer.

Weekly time frame based on a sixty-day campaign.

Week 2: Drafts questions.

Week 3: Attends briefing sessions and assists candidate in shoring up weak areas.

Week 4: Attends kick-off party.

Week 9: Votes. Attends victory party.

The Clerical Chairperson

The clerical chairperson, with the help of clerical aides, should prepare written materials in polished, consistent typewritten form for newspapers, printers, and others. This material, which has been generated and edited by the various chairpersons and their aides and reviewed by the campaign manager and publicity chairperson, should be delivered to the clerical chairperson for typing in legible form. It should include announcements, releases, letters to friends, and the brochure and presentation text.

Qualifications. The clerical chairperson should be a good typist, be able to work under pressure, and own a typewriter.

Staffing needs. Two or three aides.

Time required. Eight to twelve hours.

Duties. The clerical chairperson will do the following:

1. Recruit aides and schedule their work.
2. Check all finished copy prepared by aides.
3. Deliver own and aides' copy to destination point. Pick up printed material when ready.
4. Obtain and maintain the necessary supplies (paper, erasers, typewriter ribbons, etc.) Money for this purpose will either be requested from the finance chairperson in advance or expenses will be billed.

Weekly time frame based on a sixty-day campaign.

The clerical chairperson must be prepared to produce on short notice throughout the campaign. Peak periods are likely to be the week before the campaign begins (typing the platform and presentation) and the first two weeks of the campaign (typing publicity material).

Week 2: Meets with campaign manager for instruction and overview of campaign needs. Attends all-committee meeting and gives report.

Week 4: Attends kick-off party.

Week 6: Attends all-committee meeting and gives report.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Finance Chairperson

Because of the complexity of election laws in many states, the finance chairperson plays an extremely important part in the campaign and should keep very accurate records which will bear public scrutiny and will be an aid in planning future campaign drives. The important job performed by the finance chairperson is twofold: to act as treasurer and to run the campaign's fund drive. Once the candidate has filed for office and the campaign is under way, the campaign manager should furnish periodic reports on the progress of the fund-raising effort and the general financial status of the campaign to the candidate, but the candidate will have no responsibility for handling or bringing in money.

The finance chairperson will be able to perform the treasurer functions single-handed since the funds needed to run a local board of education campaign are relatively modest. In terms of the fund drive, the finance chairperson can also do most of the work alone, in close conjunction with the campaign manager and with the help of a small group of fund drive aides. Staff needs are minimal, since maximum donations are usually in the one hundred dollar range, with most contributions ranging from five to fifty dollars, and the fund-raising period is brief.

Qualifications. The ability to become informed about state requirements for the accounting of contributions and expenditures; ability to keep careful records and pay bills promptly; capacity to develop a strategy for fund raising and recruit donors and fund raisers; wide-ranging connections in the community.

Staffing needs. Six to eight fund drive aides.

Time required. Four to six hours per week.

Duties. The finance chairperson will do the following:

As Treasurer:

1. Open a bank account.
2. Become familiar with the local election laws.
3. Obtain a copy of your state's Campaign and Contribution Expenditure Act for reference (copies should be available at your state board of education office and/or at the state board of elections office).
4. Acquire forms that account for funds received and spent, which by law must be filled out and filed at specific deadlines. Consult with legal

expert from research committee for clarification, as regulations can be complex and frequently change.

5. Receive all contributions, receipts, bills, etc.

6. Pay all bills and sign all checks as treasurer. If cosigner is needed, call on the campaign manager.

7. Keep an account of monies received and disbursed and accounts paid. Keep all records.

8. Keep campaign manager informed regularly of campaign's financial status.

As Fund Chairperson

1. Contribute to the campaign. The individual who does so will have more clout with potential donors.

2. Review budget with campaign manager and study budgetary needs and deadlines.

3. Recruit fund drive aides to make solicitation phone calls if needed and to make follow-up calls to solicitation mailings.

4. Develop a strategy for fund raising. This might include:

- A solicitation mailing to friends, acquaintances, campaign workers, and those hosting neighborhood gatherings about four weeks before election day. Written by the finance chairperson, this letter to potential donors would refer to the candidate's announcement to run, summarize the candidate's capabilities, and ask for contributions. The chairperson should request as many key campaign workers as possible to add a personal note to the bottom of this letter for mailing to their friends (see sample fund drive letter in Chapter 3). A return envelope would be enclosed in the mailing, as would a sheet on which the recipient could indicate areas in which he or she would be willing to work for the candidate. Follow-up calls should be made within two weeks of this mailing. (Sometimes a follow-up letter is needed to reinforce these calls.) All contributors should receive thank-you notes.
- The allocation of a line for fund giving on all campaign literature where help is requested.
- Solicitation of funds and the distribution of solicitation envelopes at neighborhood gatherings. All contributors should receive thank-you notes.
- Bake sales and garage sales. These also provide an excellent opportunity for the candidate to meet the people and pass out literature.

5. Compensate for campaign deficit. If a deficit exists at the close of the campaign, telephone calls should be made to known contributors in previous campaigns who have not yet responded. If necessary, a postcampaign fund raiser should be scheduled.

6. Keep in close touch with the campaign manager. Submit all written material to campaign manager and publicity chairperson for editing and/or review.

Weekly time frame based on a sixty-day campaign plan

Weeks 1, 2: Meets with campaign manager for instruction and overall view of campaign needs. Opens checking account, obtains state filing forms and regulations, sets up books and procedures.

Week 2: Attends all-committee meeting and makes report.

Week 3: Recruits fund drive aides (for later telephoning), drafts fund drive letter and fund drive form for neighborhood gatherings.

Week 4: Attends kick-off party. Files forms as needed.

Week 5: Fund drive letter is mailed. Makes deposits as received, pays bills as needed, files forms, if any.

Week 6: Attends all-committee meeting and makes report. Makes deposits. Pays bills.

Weeks 7, 8: With fund drive aides, makes follow-up phone calls to reinforce fund drive letter. Makes deposits. Pays bills. Files forms as needed. Keeps accounts and all receipts.

Week 9: As above. Votes. Attends victory party.

Week 10: Finishes paying all bills. Files last forms. Closes account. Attends postcampaign analysis.

Fund Drive Aides

Qualifications. Ability to work easily on telephone and be comfortable asking for money.

Time required. Three to four hours over a three-week period.

Duties. Assist finance chairperson on following up fund drive letters with solicitation phone calls and soliciting directly by phone.

Weekly time frame based on a sixty-day campaign

Week 4: Attends kick-off party.

Weeks 7, 8: Does follow-up telephoning.

Week 9: Votes. Attends victory party.

The Letters-to-the-Editor Chairperson

The thrust of this phase of the campaign effort is candidate identification and support. Since letters to the editor represent free publicity and appear in a section of the newspaper that is widely read during the campaign period, the letters-to-the-editor chairperson has an important task to perform. It should be noted that this is an effort that must be coordinated well in advance.

Qualifications. The ability to plan ahead, follow schedules, and monitor closely, since newspaper deadlines must be met. A pleasant telephone voice, gentle yet firm, is desirable due to the important communication aspect of this post.

Staffing needs. The chairperson can do the job alone.

Time required. Two to four hours weekly for four weeks (twelve to sixteen hours).

Duties. The letters-to-the-editor chairperson will do the following:

1. Become acquainted with deadlines of the local newspapers and shoppers and required form or length (if any) of letters submitted.
2. Prepare a chart showing days the paper is published.
3. Make a schedule of needed letters (see sample letter to the editor in Chapter 3). A workable model would be:

   Five weeks before election—one letter, each edition
   Four weeks before election—two letters, each edition
   Three weeks before election—three letters, each edition
   Two weeks before election—three letters, each edition
   One week before election—as many letters as possible in the last edition before the election.

4. Recruit letter writers by phone well in advance from supporters, neighborhood gathering givers, contributors, well-known pro-quality-schools citizens, effective former board members, friends, etc. Often people may be reluctant to write letters, but very willing to sign one drafted for them.
5. Give letter writers deadlines for their letters according to scheduled needs. Make reminder calls.
6. Pick up completed letters and deliver them to newspapers. This is the only way the chairperson can stay in control and ensure that all letters do

in fact get written and delivered. Letters delivered by the chairperson should be signed by the writer and include the writer's address and phone numbers. Some papers won't print them without this information.

Weekly time frame based on a sixty-day campaign

Week 2: Meets with campaign manager for instruction and overall view of campaign needs. Calls local newspapers to obtain information on deadlines, letter length restrictions (if any), number of letters they will print (if restricted). Schedules letters by amount and time. Attends all-committee meeting and gives report.

Week 3: Begins to contact letter writers, schedules them, and gives them deadlines.

Week 4: First letters appear. Continues contact with writers. Picks up and delivers letters. Attends kick-off party.

Weeks 5, 6, 7, 8: Continues scheduling letter writers. Picks up and delivers letters.

Week 6: Attends all-committee meeting and gives report.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Letters-to-Friends Chairperson

The letters-to-friends campaign is a potent way to link the voting public to the candidate. It involves contacting key members of groups perceived as influential in the community and recruiting them to send out approximately ten to fifteen letters each, endorsing the candidate to members of their constituency. The letters will be mailed about three weeks before election day. Targeted groups might include:

- General economic groups. Chambers of Commerce, Jaycees, and neighborhood organizations.
- General civic groups. Service clubs, women's organizations (College Club, NOW), church groups, YMCA-YWCAs, and baseball associations.
- Special interest groups. Conservationists (Gardeners Club, Wildscape Association), senior citizens, and tennis associations.

The letters-to-friends chairperson will coordinate and supervise this selective mailing to 1,000 or more local families, taking into account

optimal geographical distribution.

Qualifications. The ability to draft a solid and adaptable sample text; the reputation as a community leader with the capacity to reach other community leaders.

Staffing needs. The chairperson can do the job alone.

Time required. Ten to twelve hours.

Duties. The letters-to-friends chairperson will do the following:

1. Identify and sign up an effective pool of letter writers. These will be recruited about a month before election day.
2. Develop a sample text. Letter writers will usually want to interject personal comments, and some writers may wish to write their own letters from scratch, but a workable model will help facilitate the letter-writing task (see sample letter to friends in Chapter 3).
3. Submit draft letter to campaign manager and publicity chairperson for editing and/or review.
4. Develop a mailing schedule in conjunction with the campaign manager and the mailing chairperson.
5. Deliver sample letter to letter writers.
6. Pick up completed letters. The campaign brochure obtained from the publicity chairperson will be included in the mailing.
7. Mail according to planned schedule.

Weekly time frame based on a sixty-day plan

Week 2: Meets with campaign manager for instruction and overall view of campaign needs. Attends all-committee meeting and gives report.

Week 3: Drafts sample letter. Drafts a list of community constituencies. Identifies an active, well-known member within each group. Contacts that individual and requests that he or she write a letter working from printed sample or add a personal note on sample letter.

Week 4: Attends kick-off party. Continues to contact influential community members. Has sample letter printed. Delivers copies to letter writers, giving a date on which completed letters will be picked up.

Week 5: Picks up all letters and prepares for mailing.

Week 6: Attends all-committee meeting and gives report. Mails letters to friends on the Tuesday of that week.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Mailing Chairperson/ Literature Drop Chairperson

Distribution of campaign material is an area that needs extensive planning and coordination. The direct mail effort, which centers around the townwide mailing, is an important part of the campaign. The timing of this mailing will be decided by the campaign manager during the strategy phase. It is usually made about two weeks before election day. Candidate recognition and voter acceptance is the aim of the mailing. The mailing should consist of a cover letter (see sample cover letter for townwide mailing in Chapter 3) and a campaign brochure.

Due to mailing costs, literature drops may be used to reach voters instead of, or in addition to, mailings (see publicity chairperson section). The aim is the same—to contact and convince the largest possible audience.

The Mailing Chairperson

Qualifications. A large basement, playroom, or succession of rooms in which to work. The ability to adhere to schedules.

Staffing needs. About thirty helpers for a one-day bulk mailing.

Time required. Twenty to thirty hours.

Duties. The mailing chairperson will do the following:

1. Obtain a bulk mailing permit at the local post office. The cost is about $50 and well worth it. The chairperson will note the number on the permit and give this information to the publicity chairperson as it will be necessary to print the number on all envelopes. It's helpful to establish a specific contact person at the post office.

2. Obtain a list of registered voters or voters' labels, if available, from the county board of elections office. Scan that list and delete identified *no* voters and areas known to oppose the candidate. Several hours will be needed to perform the scanning process.

3. Recruit the necessary helpers for the bulk mailing. In a community of 7,000 homes, approximately thirty workers will be needed to complete the mailing in one day. Some workers should be scheduled from 9-12 a.m. and others from 1-4 p.m. Some workers will stay the entire day, as the camaraderie level is usually very high.

4. Send reminder cards to helpers shortly before mailing date.

5. Obtain bulk mailing forms and trays from post office in which to put stuffed envelopes.

6. Gather necessary supplies for mailing day. These include:

- Chairs and large tables (ping-pong or card) at which folding and stuffing take place.
- Sponges and bowls with water for closing envelopes.
- Pens for additional addressing, rubber bands.
- A large coffeepot, cookies.

7. Make a total, accurate piece count before taking to post office.

8. Check deadline for receiving bulk mail with post office and take mail, with the help of several workers, to post office on schedule.

Weekly time frame based on a sixty-day campaign

Week 2: Attends all-committee meeting.

Week 3: Meets with campaign manager for instructions and overall view of campaign needs.

Week 4: Attends kick-off party. Obtains bulk mailing permit and forms for townwide mailing. Orders registered voters' labels from county office.

Week 5: Recruits volunteers for the one-time mailing effort. Sets date, site, and time in conjunction with campaign manager. Schedules volunteers.

Week 6: Attends all-committee meeting and makes report. Continues to recruit volunteers for bulk mailing effort if needed.

Week 7: Obtains a check to cover costs from the finance chairperson. Picks up trays at post office. Sets up mailing site with necessary supplies. Stages all-day mailing effort. Takes entire mailing to post office.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Literature Drop Chairperson

Qualifications. Ability to recruit, make phone calls, follow through.

Staffing needs. A captain for each district who, in turn, will recruit volunteers to distribute literature in that area.

Time required for literature drop chairperson. Approximately twelve to fourteen hours, but time will vary according to size of district being covered.

Time required for district captains. Five to seven hours.

Time required for recruited distributors. One to two hours.

Duties. The literature drop chairperson will do the following:

1. Check with local authorities at city hall to see if a permit is required for literature drops, and obtain one if necessary.

2. Recruit district captains who, in turn, will recruit young people and other citizens to distribute materials.

3. Cut up a townwide map into manageable portions which will be assigned to district captains. Captains will subdivide these areas for distribution among block or neighborhood workers.

4. Keep a large master copy of the town map with each subdivision clearly marked and the name of each district captain listed with the area assigned.

5. Distribute material to district captains.

6. Keep in touch by telephone with district captains, making sure that all areas are covered as planned. After consultation with the campaign manager, it may be decided that some areas are not fruitful enough to be included in the drop. Be careful not to write off some areas too quickly—sometimes candidates find they have support in areas they considered hopeless.

Weekly time frame based on a sixty-day campaign

Weeks 2, 3: Same as for mailings chairperson.

Week 4: Attends kick-off party. Purchases large community map and divides it into districts.

Week 5: Recruits district captains. Sets date for literature drop in conjunction with campaign manager. Sets site for pick-up of material.

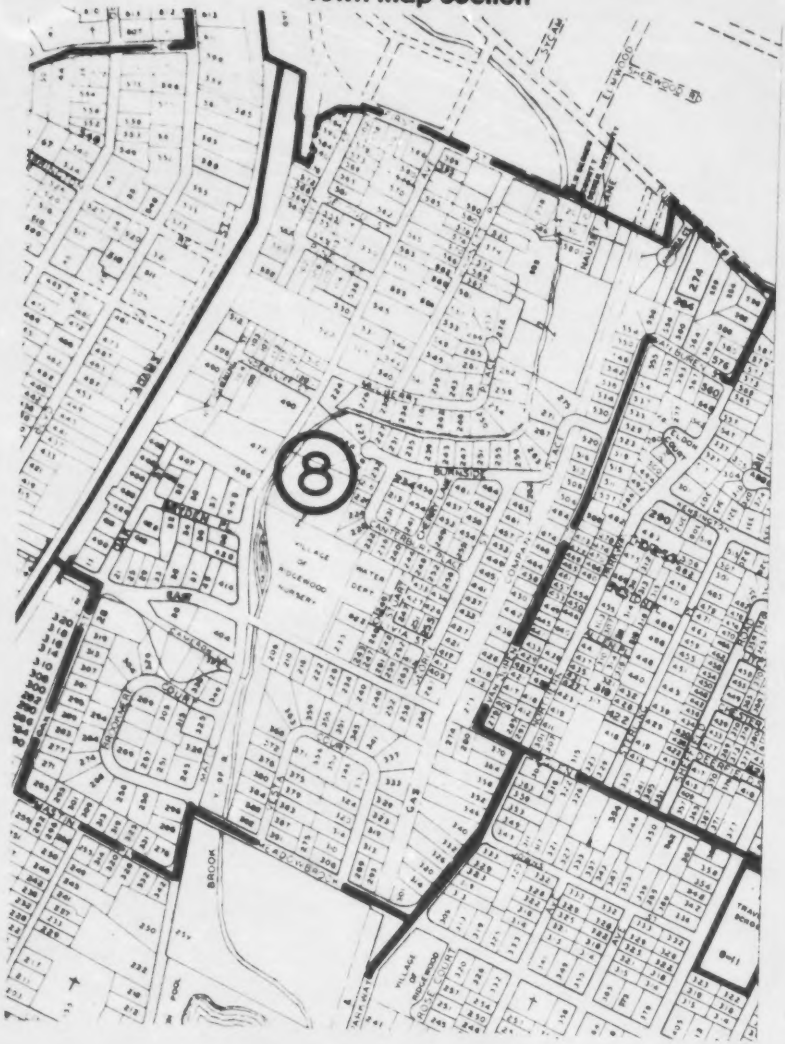
Week 6: Attends all-committee meeting and makes report. Assembles material for distribution. Sends reminder cards to district captains, citing date and place of pick-up and reminding captains to alert workers not to place literature in mailboxes (see walkathon instructions).

Week 7: Captains assemble at pick-up site to gather material and area maps. Literature drop will probably be the Saturday of this week. Chairperson makes follow-up phone calls to captains to check that material has been distributed on time and to thank.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

Town Map Section



The Neighborhood Gatherings Chairpersons

Neighborhood gathering is the general term we are using for coffee, wine and cheese, and cocktail parties given for the candidate in private homes. The organizing of this important aspect of the campaign is the responsibility of the neighborhood gatherings chairpersons.

Neighborhood gatherings are invaluable in getting the candidate recognition and support. A well-prepared, clear-thinking, pro-quality-education candidate will have a high degree of success in getting a commitment from voters at these gatherings. The gatherings give the candidate the opportunity to make a presentation, answer questions, and become more sensitized to the nature of community concerns in an informal setting. Party attendees who are impressed with the candidate's views are likely to become volunteers, fund givers, and vote getters.

A measure of the importance of these gatherings is the fact that the voters committed to the candidate at a neighborhood gathering are likely to influence the votes of their friends. If thirty neighborhood gatherings are scheduled with twenty attendees at each, 600 people will have met the candidate. If enthusiastic, they will probably bring in an average of five votes each, which could mean 50 percent or more of the total votes needed to win.

Those who host the neighborhood gatherings should be encouraged by the neighborhood gatherings chairpersons to invite four times as many people to their functions as they expect will attend. The extensive postcard mailing involved in the invitation process serves as an effective means of exposure for the candidate, shows the receiver who the candidate's supporters are, and, in the case of recipients who receive invitations to several neighborhood gatherings, acts as a potent reinforcer of the candidate's image. It does, however, take a real effort by the host to assure a decent turnout; following up written invitations with phone calls is essential for good attendance.

Qualifications. A broad range of contacts in the community, a reputation as an outgoing, sociable community member. Chairpersons must be willing to have initial neighborhood gatherings in their own homes and state this when drafting hosts and hostesses.

Staffing needs. This will depend on the size of the community and the

number of gatherings scheduled.

Time required. Assuming thirty neighborhood parties, thirty-five to forty hours total. Weeks 1-3, approximately eight hours per week; weeks 4-6, approximately four hours per week; and weeks 7-9, approximately two hours per week.

Duties. The neighborhood gatherings chairpersons will:

1. Contact and recruit potential party givers. These can be found among attendees of the kick-off party, personal friends of the chairpersons, and community members known to be sympathetic to the candidate's beliefs.

2. Schedule parties townwide, being aware of distribution and support patterns in the community. This targeting effort should be made in conjunction with the campaign manager, keeping in mind the overall campaign strategy. Certain parts of town will probably be stressed, with less-receptive areas warranting only one-time appearances.

3. Draw up a master chart/calendar containing all information regarding the neighborhood gatherings. This will include time, place, and name of those hosting the gatherings. Copies will be given to the candidate, campaign manager, and telephone and aides chairpersons, along with a town map pinpointing location of scheduled neighborhood gatherings for strategy purposes.

4. Give initial gatherings at own home.

5. Call the people who hosted the gathering the day following the party to thank them.

6. Draft suggested procedure sheets for those hosting the gatherings (see sample neighborhood gathering instruction sheet in Chapter 3).

7. Interact with campaign manager and telephone and aides chairpersons to achieve best results. Campaign manager and aides chairperson will want feedback. Telephone chairperson will wish to contact attendees after the party for recruiting purposes.

8. Submit all written materials to campaign manager and publicity chairperson for editing and/or review.

Weekly time frame based on sixty-day campaign

Weeks 1, 2: Meets with campaign manager for instruction and overview of campaign needs. Campaign manager identifies districts for heavy or light scheduling. Basic schedule is developed with campaign

manager. Begins to contact hosts/hostesses.

Week 2: Attends all-committee meeting and gives report.

Weeks 3, 4: Continues to contact and schedule hosts/hostesses. Obtains public forum dates as available. Drafts instructions for those hosting the neighborhood gatherings.

Week 4: Attends kick-off party.

Weks 5, 6, 7, 8: Neighborhood gatherings begin. Continues scheduling as needed. Speaks with hosts/hostesses on day of neighborhood gathering. Gives them instructions several days before the gathering and thanks them after the event, at the same time checking for their reactions, impressions, and evaluation. Transmits appropriate information to campaign manager.

Week 6: Attends all-committee meeting and gives report.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Publicity Chairperson

Establishing and projecting the candidate's public image is one of the campaign's key responsibilities. The goal is to get the candidate known by as many voters as possible and to inspire the confidence necessary to win the election. The publicity effort must be well coordinated. To this end, the theme of the campaign must represent the candidate and the substance of the campaign. Moreover, as noted below, styling and color of printed material must be unified for greater candidate identification and impact.

This is one instance in which professionalism is essential, for the quality of the work must be of the highest order.

Careful planning is essential in developing good publicity material for a campaign. Effective design, artwork, and layout requires thought and talent. At the same time, this arm of the campaign must adhere to a rigid time frame and requires careful coordination.

Qualification. Worker should be a professional writer, advertising person, or art or agency specialist with the skill to develop a coherent communications campaign. The intent (philosophy) of the campaign, character and worth of the candidate, and thrust of the platform must all

be translated into a sequential, unified series of materials (biographical information, announcements, advertising copy, brochure, cover letter for townside mailing or literature drop, newspaper ads, palm card for walkathon), (see publicity chairperson sample literature in Chapter 3). The campaign theme must be explicit in all printed material.

Staffing needs. The chairperson can handle the job working very closely with the campaign manager.

Time required. Twenty to forty hours.

Duties. The publicity chairperson will do the following:

1. Develop the candidate's basic image, based upon his or her personality, platform and professional expertise.

2. Create, edit, and/or review all printed campaign literature in collaboration with the campaign manager, who will have the final ok.

Be sure brochure includes candidate's photo, campaign theme, biographical information, key issues, platform statements, and candidate's telephone number. The palm card, a 3" x 5" handout, printed on durable paper, should include a photo and the above information in condensed form plus date and time of election, polling places, and position of the candidate on the ballot. (See sample on page 114.)

Note: Some candidates prefer not having their phone numbers given out; they need time to rest, and feel that a voter who is consistently unable to reach a candidate because he or she is out campaigning will feel discouraged.

3. Establish contact with key media people at the start of the campaign.

4. Select key issues and phrases, color, typeface, paper, and overall style for campaign literature. The campaign letterhead should include on its sides or bottom a listing of representative community names. These will include all committee chairpersons, important supporters, and representatives of diverse interest groups over the widest possible geographical spread. The campaign manager will be called upon by the publicity chairperson to target and solicit signers, generating the most effective list possible.

5. Try to generate newspaper interest by offering newsworthy items to the press, i.e., announcement of candidacy with photo and news release; announcement of first neighborhood gathering with photo and news release; launching of telephone campaign, "get-out-the-vote" and walkathon, with photos and news releases. The release should be typed,

double-spaced, on one side of the paper. Its first lines should include who, what, why, where, when and how. Also include brochures and other handouts when available. Release will be accompanied by a letter containing the name of the candidate, address and phone number, as well as the name and phone number of the publicity chairperson and the date.

6. Create advertising copy for serial use in newspapers. This must be based on a carefully thought-out strategy. Most newspaper ads will include a list of supporters, who have indicated on supporter sign-up sheets that their names may be used in a public endorsement. The general thinking is that all ads should include those names appearing on the campaign letterhead as well. This is not, however, a hard-and-fast rule—some ads are more effective without the list of supporters' names.

Note: The scope of the publicity effort is a function of available funds and must be tailored to budget limitations. A case in point is the townwide mailing, which is traditionally made about three weeks before the election. In case of tight funding, this can be reduced to a targeted percentage of the community, i.e., areas perceived as nonsupportive can be deleted from the mailing.

Townwide mailings are recognized as one of the most effective methods of distributing a brochure and a cover letter to the voters; however, when mailing costs are prohibitive (even with bulk-mailing rates), a literature drop is the most effective method of distribution. Although literature drops can cover all households, they have certain disadvantages: letters may get lost since in some states (check yours) it is illegal to place literature drops in mailboxes. Literature tucked under doormats or between screens and doors tends to blow away and is not read as often as delivered mail.

Weekly time frame based on a sixty-day campaign

Week 1: Meets with campaign manager for instruction and overall view of campaign needs. Campaign manager outlines required materials and chairperson begins planning and drafting.

Week 2: Reviews and finalizes biographical material and selects candidate's campaign photograph in conjunction with campaign manager. Attends all-committee meeting and makes report.

Week 3: Meets with campaign manager to finalize newspaper announcement. Receives draft of platform. Begins to prepare brochure.

Week 4: Meets with campaign manager. Turns in brochure, which is ready for printer; edits fund drive letter; prepares newspaper ads. Attends kick-off party.

Week 5: Meets with campaign manager. Edits letter to friends, writes cover letter for townwide mailing or literature drop, finalizes first newspaper ad.

Week 6: Attends all-committee meeting and makes report. Finalizes second newspaper ad.

Week 7: Meets with campaign manager. They proofread first newspaper ad galleys.

Week 8: Meets with campaign manager. They proofread second newspaper ad galleys.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Campaign Manager's Role

The campaign manager will want to have control over all written and distributed material, and therefore should work closely with the publicity chairperson, spending about twenty or thirty hours in all on the publicity effort. The campaign manager should do the following:

1. Review all materials created by publicity chairperson.
2. Encourage school newspapers to interview and run a feature on the candidate, including biographical information and candidate's program and platform.
3. Contact newspapers regarding possible features, editorial, and endorsements concerning the candidate.
4. Check newspaper deadlines and advertisement fees. These ads can be costly but can also be very effective.
5. Have six glossies made of approved candidate's photograph for use in brochures, newspapers, etc.
6. Establish quantities of literature needed, e.g., 6,000 brochures, 6,000 palm cards, 5,000 letterheads and envelopes, etc.
7. Ensure that all printed material bears the treasurer's name. Check with legal advisor (see the research chairperson) on this important matter.
8. Channel all literature through the printing process.

Note: Radio station spots, talk shows, and television public forum

broadcasts can provide valuable exposure to candidates. In some communities, candidates receive special rates for short radio ads. Check with local stations to see if they sponsor public service forums. For candidates with little experience in public media, local junior colleges and universities may give courses aimed at teaching nonprofessionals how to handle themselves (appropriate dress and demeanor, etc.) on TV and radio.

The Research Chairperson

The candidate who takes a strong stand and backs it up with appropriate, accurate facts and figures will have a better chance of winning than candidates who do not do their homework. Hard information is the foundation of any campaign, and the candidate must be prepared to demonstrate to the constituency expertise in the two or three major issues that will emerge during the campaign as well as in other matters of community concern.

Whatever the candidate's professional or business experience may be, it is unlikely that he or she will initially have the information required to run for the board of education. It is also unlikely that the candidate will have the time to research all of the necessary areas during the candidate preparation period. It is the job of the research chairperson and committee to provide the candidate with the needed study material in the form of fact sheets and summaries covering areas that have been pinpointed during the strategy period. These might include local issues of major concern, recent legislation, opponents' records, etc. The candidate should, however, be told how and where the facts were found.

Qualifications. Research skills are an invaluable asset, along with the ability to identify community experts in given fields. The chairperson must also be able to move quickly since much of the work must be completed before the campaign begins.

Staffing needs. A committee of six to ten.

Time required. Approximately fourteen hours.

Duties. The research chairperson will do the following:

1. Assist the candidate and campaign manager in developing research needs. This will probably require three meetings: an initial meeting with

the campaign manager, then two with the candidate.

2. Recruit needed researchers or research teams according to expertise. The committee might include:

- A former board member (for an overall view).
- An economist (to report on the community tax base, etc.).
- An educator (to research area of special education).
- A NOW member (to report on status of Affirmative Action).
- A volunteer who will contact the state board of education to amass and analyze all pertinent printed material, e.g., responsibility of elected officials, legislation (past, current, proposed).

3. Delegate tasks and time limits to committee members and follow up to assure that deadlines are met.

4. Recruit and delegate all clippings and scrapbook activities to a historian.

5. Recruit a legal advisor who will:

- See that all papers are properly filed and that all legal requirements are met.
- Check with local board of education and state departments of education about which campaign tactics, if any, are illegal in your area.
- Review all campaign literature, including proper return address and "paid for by" notations.
- Deal with any legal issues that arise during the campaign, such as preparation of contracts for services and libelous statements.
- Work with finance chairpersons to assure that all contribution reports meet legal requirements.

6. Correlate any ongoing research.

7. Coordinate all committee reports and write a brief analysis.

Weekly time frame based on sixty-day campaign

Week 1: Meets with campaign manager for instruction and overall view of campaign needs. Contacts research aides and gives them their assignments, reminding them of great time pressure.

Week 2: Meets with candidate and submits initial reports. Attends all-committee meeting and gives report.

Week 3: Meets with candidate and submits balance of reports. Attends briefings.

Week 4: Attends kick-off party. Is available for other research needs,

should they arise.

Week 6: Attends all-committee meeting and gives report.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Research Committee

Qualifications for research committee members. Expertise in given field. Ability to produce quickly under pressure and meet deadlines.

Time required. Approximately three hours per member. Legal advisor will be required to be on call throughout the campaign.

Duties. Research committee members will develop fact sheets and summaries based on personal knowledge and pertinent research tools.

Weekly time frame based on sixty-day campaign.

Weeks 1, 2: Prepare reports in subject areas for submission no later than end of week 2.

Weeks 3-8: Keep an eye out for any significant development in subject area about which candidate should be informed.

Week 4: Attend kick-off party.

Week 9: Vote. Attend victory party.

Week 10: Attend postcampaign analysis.

The Telephone/"Get-Out-the-Vote" Chairperson and Aides

The telephone campaign is one of the major tools in the campaign effort. It is a two-pronged thrust, consisting of phone polling and the "get-out-the-vote" effort.

Phone polling begins five weeks before the election. Its primary purpose is to locate the support the candidate needs to win the election. It is also used to acquaint voters with the candidate, to inform voters of public forums at which the candidate will speak, to invite voters to neighborhood gatherings at which they will meet the candidate, to identify potential supporters who need to register to vote, to recruit workers, and to request money. It should be noted that the phone polling

is *not* a device for explaining positions or arguing issues. Detailed instructions for conducting this important effort are given below.

The "get-out-the-vote" effort is an entirely separate effort based on the information gathered through polling. It is a short, four-day campaign, comprising the Saturday, Sunday, and Monday before Election Day and Election Day itself. As many volunteers as possible will be involved in order to contact the sure and potential support for the candidate as identified by the polling effort and to urge these voters to go to the polls. Detailed instructions are given below.

Qualification. Ability to oversee a large group of people, keep records, and organize the "get-out-the-vote" effort, which will require total involvement and follow-through during the last week of the campaign. The chairperson must have a large basement in which telephones, tables, and supplies can be kept and must recognize the importance of his or her task, both in identifying and bringing in votes and in setting the "tone" for the campaign.

Staffing needs for phone polling. Five day chairpersons plus as many telephoners as possible.

Staffing requirements for "get-out-the-vote" effort. One captain per district plus a pool of telephoners.

Time required for telephone/"get-out-the-vote" chairperson.

Early in the campaign	10-12 hours weekly
Mid-campaign	12-16 hours weekly
Eighth week of campaign (through Friday)	12-14 hours weekly
"Get-out-the-vote" effort	14-16 hours

Time required for day chairpersons. Six to eight hours weekly (weeks 4 through 8).

Time required for phone pollers. Will work in multiples of two to three hours, i.e., 9-12 a.m., 12-3 p.m., 5-7 p.m. Should be scheduled weekly or more if possible (weeks 4-8).

Time required for district captains. Twelve to sixteen hours during the "get-out-the-vote" effort.

Time required for "get-out-the-vote" telephone poll. Three hours per aide.

Duties of the Telephone/"Get-Out-the-Vote" Chairperson

1. Recruit workers.
2. Draw up telephone campaign plans in conjunction with campaign

manager.

3. Write telephone script.

4. Conduct training sessions for day chairpersons, district captains, and pollers.

5. Set up time schedules for task completion.

6. Collect and organize all information derived from telephone campaigns.

7. Organize "get-out-the-vote" campaign. Since the total effort of the telephone chairperson's several weeks' work will be funneled into the last four days of the campaign, this essential and highly important effort cannot be delegated.

8. Submit all written materials to publicity chairperson and campaign manager for editing and/or review.

Phone Polling Procedure

1. Strategy and goal setting. It is necessary to study past election returns by district to establish the number of votes necessary from each district in order to win. This number plus a small margin is the initial goal for each district. In some districts, a further goal might be to amass strong margins for the candidates, while in others the goal might simply be to undercut strong margins anticipated for the opposition. Progress toward reaching the goals, that is, locating the desired number of supporting voters, must be checked periodically in order to focus phoning activity where it is most needed.

2. Leadership. The telephone/"get-out-the-vote" chairperson appoints a chairperson for each weekday (systematic phoning is generally not done on weekends). This committee of five meets once with the telephone/"get-out-the-vote" chairperson to set up the operation and learn the procedures. Each day chairperson is responsible for lining up workers for that day, finding two, three, or more workers for the morning (9 to 12 a.m.), the afternoon (12-3 p.m.), and the evening (7-9 p.m.) Efforts should also be made to find workers for evening mealtime. The most productive phoning time is evening, but this is also the most difficult period to staff. The day chairperson is responsible for supervising volunteers of that day of the week and for lining up alternates to fill in for no-shows. The telephone "get-out-the-vote" chairperson provides overall supervision.

3. Location and supplies. A central location for the phoning is highly desirable. This site should be equipped with an appropriate number of phones (generally three, installed temporarily for the purpose), a large table, chairs, phone books, and reverse phone books (organized by street address and by phone exchange), and a large map of the municipality (which can usually be purchased at a modest cost from the city or town hall) showing election and school districts. Centralizing the operation is important because it permits closer supervision of the volunteers. The headquarters becomes a sort of nerve center, contributing to volunteer camaraderie.

4. List gathering. The third week of the campaign, the week before phoning begins, the office should be set up and certain information gathered and tabulated. This includes the following:

a. The registered voters* (Republican, Democrat or Independent) lists. These lists, known as RDI lists because they indicate party affiliation, may be acquired from the city or county board of elections. Compiled by the election district, they serve as basic record-keeping tools. They are organized by street address, with the streets listed alphabetically.

b. Files and lists of workers from campaigns of former sympathetic candidates. (Former campaign managers may have these.)

c. Lists of those who voted in the last few elections. This information is available at the city or town hall.

d. Lists of new registrations (available through county voters registry).

e. Lists of newly registered high school students (available through county voters registry or county board of elections).

f. Lists of new families in each school (available from board of education).

g. Lists of those who voted by absentee ballot in last election (available through county voters registry).

h. Computer printout gummed labels of registered households. These can be purchased from the county board of elections.

i. Some county election boards also have "prime voter lists." These are

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*There may be local variations concerning voter registration and voter qualifications for general elections and school board elections. It's essential that you inform yourself of local requirements.

lists of people who have voted consistently in all elections for the past 3, 4, or 5 years.

5. Underlining. Volunteers with past polling experience and knowledge of their districts are enlisted to mark the RDI lists by underlining the names of those they feel are or would be sympathetic to the candidate. Also underlined should be the names from lists b, c (selectively), d, e, f, and g (selectively). The underlined names in the RDI lists comprise the bulk of the phone contacts to be made, focusing on the more likely areas of support and reducing the number of unproductive calls. The early phoning made to likely supporters will probably turn up volunteers who can be integrated into the campaign. If RDI lists with phone numbers cannot be obtained from prior campaigns, phone numbers for the underlined names should be written in. This is a large task, which represents an ongoing clerical job. It is important that pollers are given lists bearing phone numbers in order to use their time efficiently. Reverse phone books organized by street address are invaluable in tracking down numbers. Check with your local library. These references may be produced under various trade or publishing names, such as Hanes, Stewart, or Crisscross.

6. Making calls. When a volunteer arrives to phone for the first time, he or she is given an overview of the phoning process and how it ties into the "get-out-the-vote" effort. A suggested script for the call is provided (see sample script for phone polling in Chapter 3). This script may be changed as needs arise; it may focus on asking if the voter wants information on the candidate or wants to attend a neighborhood gathering; it may give information on a candidates' forum; it should always be constructed to elicit a response that will indicate the voter's level of support for the candidate. Each phoner is assigned a district RDI list from which to phone underlined names. Upon completing the calls, the phoner marks the name with the code A, B, or C. A = explicit support, B= undecided, C = opposed. If the voter is an A or B, this information should be listed by the phoner on a yellow pad. At the end of each day, the telephone chairperson will make up a file card for each A and B voter, using the gummed sticker labels. These cards will be filed in a central file located at telephone headquarters. The phoner should also process any requests for information and channel any offers to help in the campaign to the appropriate committee chairpersons (see sample instruction sheet for

phone callers in Chapter 3). A running list of people willing to help in the "get-out-the-vote" campaign should be carefully kept by the telephone "get-out-the-vote" chairperson.

7. **The Card File.** A file of A and B voters becomes an invaluable tool. Organized alphabetically by district, it provides workers with the names of known supporters for the candidate at a glance. It can also be used by other workers to find helpers in a particular location. On the file card may be kept such information as the names of all the registered voters in the household and their nicknames, the phone number, and the type of support they will give or have given. Ideally, by the end of the phone polling, the telephone "get-out-the-vote" chairperson will have an A and B file with the number of voters needed to win the election.

8. **Tie-in to neighborhood gatherings.** It is important that the telephone "get-out-the-vote" chairperson and the neighborhood gatherings chairperson be in close touch. The volunteer sign-up sheets and attendance sheets filled out at neighborhood gatherings should be delivered to phone headquarters after review by the campaign manager so that support evidenced can be recorded on the RDI lists and so that A cards can be made. After a neighborhood gathering, the telephone "get-out-the-vote" chairperson should find out what the host or hostess thought the guests' positions regarding the candidate were and to learn of supporters who may have turned up in the invitation process. Any neighborhood gathering attendee, unless known to be in opposition to the candidate, can be counted at least a B.

9. **Clerical procedure.** Simultaneous to the phone polling, several clerical jobs need to be done by the telephoners:

- The A file must be kept up to date.
- Numbers must be looked up for phoners.
- Literature must be sent out as requested.
- Appropriate chairpersons must be notified of new volunteers.
- Those hosting neighborhood gatherings must be informed of people desiring invitations.
- Neighborhood gathering attendance lists must be tabulated and information obtained transferred to the RDI lists.
- During the last week before the "get-out-the-vote" effort, lists must be made up of A and B voters with phone numbers for distribution to volunteers.

10. Personnel. The spirit of the phoning and clerical operations is extremely important and contributes significantly to the morale of the campaign. Everyone who wants to volunteer should be given a job appropriate to the amount of time he or she can give. The more workers the merrier. It is very important to build as diverse a volunteer staff as possible in terms of age, sex, school district, past affiliation. It is absolutely crucial that workers feel their time is well spent and that the organization is efficient. It is important that the atmosphere of headquarters be positive, calm, constructive, and free of gossip. Workers who are not effective doing one job should be discreetly given another task to do. It is important to have a core of experienced callers who will phone regularly, although the one-time volunteer is also very useful.

"Get-Out-the-Vote" Procedure

1. Leadership. Each district should have a captain, although a captain may supervise more than one district. Captains will be recruited far in advance from among the best telephoners. They are responsible for:

- Lining up enough phoners so that the projected number of calls for that district may be handled with no more than ten calls per person.
- Asking the phoners if they can provide transportation to the polls to the people on their list. If so, this information should be included in the calls.
- Seeing that phoners are invited to the Saturday morning rally and receive a list of calls and instructions.
- Checking the progress of the callers and filling in when problems arise.
- Reporting to the telephone "get-out-the-vote" chairperson.

2. Preparing lists. The captains should draw up lists by district of the A and B voters with phone numbers. It is wise to keep the A and B lists separate and to identify them so that the callers know the level of commitment of the people they phone. A duplicate copy of each district list may be made as a master for the captain. The original is then cut into pieces of ten names, each to be distributed with instructions to a volunteer.

3. The rally. On the Saturday morning before the election, a rally should be held in conjunction with the walkathon effort to gather all volunteers together for a pep talk by the candidate and to receive

instructions verbally. The telephone/"get-out-the-vote" chairperson and the walkathon chairperson should work out details of this rally. The district captains should take phone lists and the phoner's instruction sheet (see sample instruction sheet for "get-out-the-vote" telephoners in Chapter 3) to any workers who cannot attend the rally. Calls should be made as close as possible to election day so that voters do not forget to go to the polls. Most local parent organizations will assist in the "get-out-the-vote" effort by calling on their membership to remind them to go to the polls. A committee worker should be delegated by the "get-out-the-vote" chairperson to contact each parent organization to see that this is done. Although this does not assure a vote for a specific candidate, it stimulates voter interest and increases participation in the election process.

4. The mop-up. During the last weekend, a final effort may be made to complete any phone polling that has not yet been done. Volunteers are highly motivated at the end of a campaign and are willing to work over the weekened to do whatever they can. This final phone polling is a mixture of information giving and "get-out-the-vote" effort.

5. Thank-yous. Every volunteer involved in either the phone polling or the "get-out-the-vote" campaign should be thanked by the candidate in some way, so it is important that the telephone "get-out-the-vote" chairperson keep a running list of workers. After the election, a potluck luncheon or supper for phone workers, captains, and day chairpersons is a nice way to show the telephone "get-out-the-vote" chairperson's appreciation. This would be given by the chairperson at telephone headquarters.

Weekly time frame for telephone/"get-out-the-vote" chairperson based on a sixty-day campaign

Week 1: Meets with campaign manager for instructions and overall view of campaign needs. Orders telephones, supplies that are needed during the campaign, large map of municipality; organizes the telephone headquarters.

Week 2: Meets with campaign manager for identification and targeting of areas. Writes instructions for telephone day chairpersons and for phoners. Drafts day chairpersons and makes appointments to meet with them. Attends all-committee meeting and makes report.

Week 3: Meets with campaign manager and day chairpersons. Together reviews the needs of the polling effort and the "get-out-the-vote" campaign. Chairperson makes and posts schedule; phoners' names are filled in. Chairperson starts card file, does initial underlining of RDI lists. Phoning operations site is ready.

Week 4: Telephoning begins. Procedures are followed as defined. Underlining begins. Chairperson checks overall progress and adjusts as needed. Funnels lists of volunteers made from phone calls to campaign manager or other chairpersons. Maintains ongoing contact with neighborhood gatherings chairperson; keeps up card file. Attends kick-off party.

Week 5: Continues phoning and performing week 4 tasks. Checks progress. Identifies districts that need additional calls.

Week 6: Like week 4. Attends all-committee meeting and makes report.

Week 7: Continues phoning. Checks progress. Readjusts thrust where necessary. Recruits and meets with district captains for "get-out-the-vote" effort.

Week 8: Finishes phoning. Prepares "get-out-the-vote" lists.

Election weekend and last days of campaign:

Saturday: Attends morning "get-out-the-vote"/walkathon rally.

Sunday and Monday: Checks on progress of calling.

Tuesday: Reviews captains' reports.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

The Walkathon Chairperson

The walkathon is part of the "get-out-the-vote" effort that takes place during the weekend before Election Day. Walkers and phoners gather together that Saturday morning to launch a final rousing effort. Many supporters who can do only one thing during the campaign will see the walkathon as their opportunity to participate. By ringing their neighbors' doorbells and expressing their personal enthusiasm for the candidate, they can affirm their concern about the student body and the schools, and have real impact on the voters.

The walkathon is usually preceded by a coffee and doughnut rally coordinated by the walkathon and telephone "get-out-the-vote" chairpersons. This meeting is generally held in a centrally located high school or other public building. The candidate is there for this last campaign get-together, thanking voters, urging them on, and inviting them to the victory party. (The candidate may have already done all this by mail while reminding them of the walkathon date—see sample letter from candidate to walkers in Chapter 3). This is an occasion for walkers and telephoners to pick up their instructions (see sample material in Chapter 3) and lists. It is a time to share last-minute information and to pool energy for the final push needed for victory.

Qualifications. Must be well organized, able to plan, recruit volunteers, write an instruction sheet, follow through on a tight schedule and, above all, imbue the group of eager walkers at the rally with a sense of the urgency of the moment. The walkathon is an event in which urgency equals votes. This is an excellent task for a dedicated worker who can help only late in the campaign.

Staffing needs. As many walkers as possible. The walkathon provides an excellent way to use an overflow of volunteers who have been attracted by a spirited campaign.

Time required. Fourteen to sixteen hours.

Duties. The walkathon chairperson will do the following:

1. Develop a list of walkers from material received from campaign manager (lists of attendees at neighborhood gatherings, etc.) plus personal contacts.

2. Procure two community maps and divide one into blocks covering fifteen to twenty-five houses each (depending on density). The second map will be kept intact as a record. Assign walkers to specific areas.

3. Develop packet for walkers. This will include:

- A procedure sheet to be developed by the chairperson (see sample procedure sheet for walkathon in Chapter 3).
- A palm card, procured from the publicity chairperson.
- An assigned map segment.

4. Show all written material to campaign manager and publicity chairperson for editing and/or review.

5. Coordinate Saturday morning rally with telephone "get-out-the-vote" chairperson.

6. Assign a volunteer to purchase coffee and doughnuts for the rally.

7. Attend Saturday morning rally to welcome and inspire workers, distribute walkers' packets, and introduce candidate, who will say a few words.

8. Arrange to deliver walkers' packets to homes of walkers who do not attend rally.

9. Check with walkers late Saturday afternoon and Sunday. (The walkathon is conceived as a one-time effort but may need to be carried over to Sunday.)

Weekly time frame based on a sixty-day campaign

Week 2: Attends all-committee meeting.

Week 4: Attends kick-off party.

Week 6: Meets with campaign manager for assessment of campaign needs and to obtain lists for potential volunteers. Purchases map. Organizes routes. Checks with publicity chairperson about status of palm card. Attends all-committee meeting and makes report.

Week 7: Sets time and place for Saturday morning rally with telephone "get-out-the-vote" chairperson. Contacts all volunteers with this information. Writes instruction sheet for walkers.

Week 8: Telephones additional volunteers to remind of walkathon dates and rally. Cuts up map into walker areas. Gets palm cards from publicity chairperson. Puts together walkers' packets.

Weekend before Election Day:

Saturday morning: Attends rally.

Saturday, all day: Follows progress of walkathon, attempting to have it completed in one day.

Sunday: Follows up on termination of Walkathon if carried over. Receives reports from walkers.

Week 9: Votes. Attends victory party.

Week 10: Attends postcampaign analysis.

Walkathon Walkers

Time required. Attending Saturday rally and walking, two to four hours.

Chapter 3

Sample Campaign Literature

Chapters 1 and 2 have shown the overall campaign organization—the people and the tasks that contribute to a winning campaign. This chapter contains the sample campaign literature referred to in the previous two chapters. These are included to give you examples of literature that have proved effective in other campaigns, and a model to work from. There are, of course, many other ways of handling the same material. Each candidate's campaign literature should be tailored to reflect his or her ideas and personality, and to have maximum impact on the local community.

Keep in mind that the names of representative community members—including all committee chairpersons, important supporters, and spokespeople for diverse interest groups—should be listed at the side or on the bottom of all campaign letterhead.

The Candidate

Biographical Information
Candidate John Doe*

1. *Personal*

Candidate Doe and his wife, Beatrice Allen Doe, have lived at One Main Street for the past sixteen years. All three of their children attend the Ridgewood public schools. Ann is a high school senior. John is in junior high school, and Jim is in elementary school.

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*In the interest of projecting a coherent biographical sketch, Candidate Doe is referred to here, and in the other sample literature in in this book, as male only.

2. *Education*

Candidate Doe received his M.B.A. in 1955 from State University and a B.S. in chemical engineering from Rutgers University in 1952. He has been the recipient of many awards and lectureships.

3. *Professional*

Candidate Doe is President of International Isotopes located in Wayne, New Jersey; Los Angeles, California; Baltimore, Maryland; and Akron, Ohio. The company is engaged in the applications of nuclear science and engineering.

From 1956 until 1975, Candidate Doe was on the faculty of State University.

He has served as a consultant to industrial firms, military groups, and other government agencies. Candidate Doe is a member of several scientific societies, including American Chemical Society, American Physical Society, and American Association for the Advancement of Science.

4. *Community*

Citizens Park Association, Director.
East Side Episcopalian Church, Elder. Taught high school class.
Ridgewood Tennis Association, President (eight years).
Boy Scouts, Merit Badge Counselor.
Travell Home and School Association, President (1972-76).
Ridgewood Association for Good Schools.
Long-Range Planning Committee, Meadow Hospital.

5. *Experience Directly Relevant to Membership on the Board of Education*

- Twenty years in teaching and administration.
- Board of Trustees of several educational and philanthropic organizations.
- Policy formulation in wage and salary administration and union negotiations.
- Management responsibility in budget preparation, analysis, and control.
- Seminars and lectureships at Teachers College in areas of engineer-

ing and management.

Analysis: *It is important that any candidate be able to bear public scrutiny—all must make available full information about the five areas listed above.*

Pre-Announcement Letter

Candidate John Doe
One Main Street
Ridgewood, New Jersey 07450

February 25, 198-

Ms. Susan Taylor
2 Broadway
Ridgewood, New Jersey 07450

Dear Susan:

This week I will be announcing as a candidate for the Board of Education. I am running because I place a very high value on the quality of our schools and the education of our youngsters. I am particularly concerned about the following aspects of public education in our community at this time:

- The cost of education both now and in the future. I believe we must make significant progress in the identification of full program costs and related effectiveness.
- The absence of well-thought-out goals and plans for our schools. I believe our schools should have a clearly articulated direction and measurable goals against which we can track our progress.
- How the Board views its responsibilities. I believe the function of Board members is to assure that our schools are well managed—not to manage our schools.

I am running because I believe many Ridgewood citizens share my concerns about our schools. Knowing I will need help in the campaign, I am asking for your support in ensuring the best possible education for our children.

With appreciation,

John Doe

Analysis: *The letter identifies the recipient as someone important to the campaign. The letter writer invites the recipient to participate in the effort and implies that the candidate believes the recipient shares a similar outlook toward the necessity for quality education for the community's children. The letter shares the candidate's main objective with the recipient.*

Letter to Committee Chairpersons and Early Supporters

Candidate John Doe
One Main Street
Ridgewood, New Jersey 07450

February 27, 198-

Mr. & Mrs. William Miller
122 Park Place
Ridgewood, New Jersey 07450

Dear Nancy and Bill:

I want you to know how much I appreciate your willingness to help in my campaign for election to the board of education. I will pledge to do my best in following through on all of my speaking and writing responsibilities so that with our combined efforts the campaign will be a success. Knowing your many obligations, I doubly appreciate your participation.

I thought you would be interested in a brief progress report on the campaign as it is currently formulated:

1. We plan approximately thirty neighborhood gatherings and have already located the host and hostess for each one. Julie and Stan will do the scheduling for the East and West Sides, respectively.
2. Jane will be organizing the telephone campaign.
3. Joe is developing publicity.
4. Dick has opened our campaign fund account and is drafting a letter to be sent to 100 friends.
5. Ann is scheduling the letters to the editor, and Michael Smith is working with young absentee voters under Ellen's direction.
6. Brian is arranging the letters-to-friends campaign.

We are looking forward to seeing you at the kick-off party at O.C.'s house on March 7 at 8:30 p.m.

With warmest personal regards.

Sincerely,

John Doe

Analysis: *A pattern must be established by which the candidate communicates with key campaign workers. The aim is to inform, share, include, encourage, and thank. In this spirit the above letter:*

1. *Thanks the campaign worker and acknowledges the worker's importance to the campaign effort.*
2. *Assures the campaign workers that the Candidate is doing his/her job.*
3. *Reveals the overall plan and who is doing what (again, the team approach).*
4. *Establishes the next meeting time (kick-off party).*

The Candidate's Platform

This community has the essence of a fine school system we can be proud of. A school system is a bit like a great steamship. Once you get it going in the right direction, its momentum will carry it for miles even after the engines are shut down. I feel that basically we have been on the right course over the past years. But as I watch the board operate today, I can't quite determine whether it is trying to shut the engines down or change course dramatically. In either case, I think it is playing a dangerous game, one that should be unacceptable to all of us in the community.

The Cost of Our Schools

We spend over $19 million per year on education in this school district. Our citizens have been prepared to spend money at a rate comparable to communities of substantially greater means. For example, neighboring communities have $96 thousand and $158 thousand in ratable property value behind each pupil, while Ridgewood has only $61 thousand. Yet our expenditures per student and our student-to-teacher ratios are very similar. Our outlay for schools represents a tremendous amount of money. For the most part, I believe that it is money well spent. This does not mean, however, that money cannot be wasted in education—and I

believe we have wasted money. Perhaps the single largest waste comes in the most subtle form—new programs that are adopted and continue year after year without any real assessment as to their true cost and overall effectiveness. Progress does not have to mean the expenditure of more money. The board's rejection of the Early Childhood Program was disappointing not only because we lost an opportunity to improve our educational process but also because of the implication by one board member that after state funding ceased, this program would be a net new expense for Ridgewood. This attitude demonstrates the board's unwillingness to examine our existing activities in terms of their continued desirability as compared to new and more promising programs.

Money can also be wasted if not spent at the right time. The clearest example is the problem of the basic maintenance of our physical plant. A case in point is the costly repair work to our electrical-mechanical facilities recently under way at our junior highs and high school. This should have been done two years ago.

I feel that our thrust in the area of money management should be twofold: the initiation of zero base budgeting, which calls for us to examine the validity from a zero base of all activities every year, and the establishment of a program of cost-effective budgeting where the cost per pupil in fully loaded program areas is examined against the priority and effectiveness of the program.

Planning and Goal Setting

If you were to ask our present board to give you a list of its current goals, I feel that it would be hard pressed to do so in any concrete form. Statewide assessment will in all likelihood call for such goals in the future. How much more to your advantage it would be if we had an established process of planning and goal setting for our schools.

The absence of specific goals leaves the determination of overall direction to individual staff members. Clearly, goal setting should be the major responsibility of our board, with advice and information from our professional staff and community.

Let me give you a quick example of my idea of directions to follow: emphasis on individualized instruction; emphasis on basic skill development; emphasis on social interaction skills; emphasis on problem-solving skill development. I believe specific and measurable program and

learning goals should be established in these areas. When goals are too vague to be measured, you can't tell whether they have been achieved. It thus becomes impossible to understand what action is required to correct the difficulty. By specific, I mean that we should be prepared to say that X percent of students in a specific grade will be reading at or above grade level and that Y percent will be achieving at or near their potential.

Establishing aims and direction is a fundamental board responsibility. If you have to ask yourself what our plans and goals are, you should ask yourself why they have not been set or communicated by the board.

My Educational Philosophy

I believe that it is the responsibility of education to expand the potential of all youngsters—whether for higher education or for vocations. This includes teaching our kids self-discipline; how to work with other people; how to solve problems; and how to appreciate the world around them.

I believe that our youngsters need to learn how to learn. The rate of change in society today is such that knowing facts alone will make your knowledge obsolete almost overnight. We must assume that this rapid change will continue. The challenge for our kids will be to learn to learn—to manage and adapt to change.

The youngster who hates school because he or she finds it an unexciting, unhappy existence will be the same adult who complains about being out of control in a changing world.

I believe that the basics in education are essential and must be mastered thoroughly before we can proceed to anything else. After all, reading is the vehicle of learning; writing is the vehicle of expression; and math is the purest form of logic and problem solving. We have weaknesses here in Ridgewood on which we should be concentrating: writing and reading comprehension. We have real strength in our schools to maintain: math and science.

I believe that innovations and new activities should be encouraged where they can be demonstrated as improving and contributing to our educational objectives, not change simply for the sake of change, but well-thought-out change.

I believe our schools are for *all* of our youngsters. Our own professionals are prepared to admit that we are not as effective as we

might be with youngsters who have very real learning deficiencies. A clear priority for our board should be to ensure that these students are systematically identified and that programs are developed to assist them.

Community Involvement

How does the community get involved in educational matters? The process of planning and goal setting offers ideal opportunities for parents and students to become involved in the school system. Consulting with parent groups and parent organizations on issues of broad program design and policy is an effective way to foster community involvement. Many of our principals, operating under direction from the board and school superintendent, are currently involving parent groups in the broad educational issues within their schools. They should be encouraged and supported in doing much more.

The schools belong to the community—not to the staff and not to five board members who have effectively shut parents out of the process. We have only to look at the capricious decision which eliminated early childhood education to ask ourselves if the board involves or is responsible to the voice of the community. It is truly amazing how frequently the board has felt it necessary to protect the community from *itself.*

Managing Our Schools

I believe that the basic responsibility of the board is to see to it that our schools are well managed—not to manage our schools. We should look to the board to select a high-quality professional staff, give that staff direction, and evaluate its performance.

I believe that our present board, in an attempt to avoid being a rubber stamp, has paid insufficient attention to its primary responsibilities of planning, goal-setting and policy making. There is no clear way to evaluate the performance of administrators. If each administrator had a set of goals and programs for which he or she was accountable, progress and results could be appraised in a fair and objective way.

I believe that we want and need a board of reasonable people whose focus is on the efficient and effective education of our youngsters. Board members should be people who respect the views and values of others and don't take opposition as a personal affront to their integrity.

We all want to have confidence in the decisions of the board. This confidence can be achieved only through trust and the knowledge that the process by which decisions are being made is open, proper, and fair to all concerned.

It is only through such a process that the board can demonstrate to the community that it can operate with one eye on costs and the other on the quality of our children's education.

Your Vote

Your vote is an action of importance. The vote you cast for the Board of Education is one of your most visible and meaningful ways of participating in the education of your children. I hope that I have been clear about how I feel and would ask that you think carefully about what all the candidates have said before casting your vote . . .

For your children's sake.

Analysis: *The platform of a serious candidate is based on thorough preparation and a thoughtful examination of the school system and its impact on student life. This sample platform incorporates these qualities. It exhibits the candidate's ability to identify weaknesses and strengths of the educational system, establishes his or her educational priorities, presents the candidate's overview of the system, and provides a flexible philosophy and a direction for shaping the system to which voters can relate. The platform provides the basis for subsequent written material and speeches.*

Cost of the Schools. *Candidate Doe shows a firm grasp of school finances and raises important questions regarding efficacy, accountability, program assessment, and the setting of priorities.*

Planning and goal setting. *Candidate Doe presents specific ideas for the voter to consider. They are discussed only briefly here. The candidate is prepared to address these subjects in depth at public forums and neighborhood gatherings.*

Educational philosophy. *In a clearly articulated statement of belief, the candidate presents his or her view of the educational process as a determining factor in the lifelong process of individual growth. While acknowledging the system's strength and the importance of teamwork to its functioning, the candidate provides personal views of the direction the*

system should follow to correct existing weaknesses.

Candidate involvement. *A candidate who feels the community should be involved on an ongoing basis is clearly in touch with what is best for the schools. Parental input is essential to the well-being of the system. Such involvement provides insight into the aspirations and values of the community, permits early reading of problems within the community, and acts as a barometer for public opinion. The school staff and school board must maintain a dialogue with parents through seminars, study groups, and planning committees.*

Managing the schools. *Candidate Doe stresses that managing the schools is the task of the professional staff, a process in which the board must not meddle. The board's job is to set high standards, create policy, and see that the policy is implemented. The board hires and monitors the professional staff but does not interfere with its function except where performance becomes inadequate and dismissal of personnel must be considered.*

Your vote. *The candidate explains the importance of each parent's vote and asks for the voter's informed consideration.*

Candidate's Speech

Thank you. I appreciate the opportunity to meet with all of you this evening and to talk with you about our schools. It would be fair to say that we are all here for the same reason—because the education of our youngsters is one of the most important factors in our lives. It is the object of a great deal of our time and money. Indeed, we frequently decide which town we want to live in based upon the schools. The schools belong to the community, and our board of education is supposed to represent that community, giving our school direction, establishing educational objectives, and assuring that the schools are managed in such a way that those objectives will be achieved. So it is an understandable and healthy sign that parents take an active interest in the board's activities and an even stronger interest in whom they elect to the board.

I am sure that an obvious question at this point is "Who is John Doe and why is he running for the board of education?"

I am the father of three children, all in the public school system. I am an

engineer and company president. My wife, Beatrice, grew up in Ridgewood and attended Ridgewood schools. In fact, that's why we moved here—to raise our family in a community with a tradition of dedication to fine education.

I have been active in community affairs since I moved to Ridgewood sixteen years ago and have served in a number of organizations, including holding the office of president of the Travell School Home and School Association for several years. I am a candidate for the board of education of this community for one reason only: my genuine concern for the future of our schools.

I think it is fair to say that the single most crucial problem facing our schools today, as well as schools throughout the nation, is in the area of costs. We spend almost $20 million a year here in Ridgewood on education—a tremendous amount of money—nearly $10 million more than we spent ten years ago. And yet, despite increasing expenditures, the devastating effects of inflation continue to curtail our purchasing power and the cost of education continues to rise.

How can we maintain the high quality of education that we have offered our children here in the Village in the light of today's harsh economic realities?

To fully appreciate the situation we face and to be better able to decide the direction we should take, I think we must look at the problem from these aspects:

1. How we finance; that is, where the money to run our schools comes from.
2. How we budget; that is, where we decide to use that money.
3. How we evaluate; that is, how we know whether we've gotten the most out of that money.

Let's talk first about financing.

In Ridgewood, we have normally received about 10 percent of our budget in the form of formula or minimum aid from the state. In 1980-81, for example, out of a total budget of more than $19 million, almost $1.8 million was provided by state funding. Suppose state aid were cut. It would require a substantial increase in Ridgewood's property tax even to keep the school budget at its current level—assuming no increases for salaries or anything else. Add to this the fact that salary augmentations for staff professionals have consistently been exceeding any overall

increases in budget, and the picture becomes very complex. In fact, it is clear that we are entering a new era in the financing of education. The question is no longer where can we spend *more* to *enhance* our system but, rather, how can we spend less and yet maintain it. Which brings me to the second point I'd like to cover with you—budgeting.

Since there can be no doubt that we will be working with limited funds and tight budgets for the foreseeable future, how can we make the most intelligent use of the money available? I believe that the board must give very serious and reasoned thought to the establishment of budget priorities and to the process that it will use to set those priorities. Intelligent and rational decisions are promoted by making complete and accurate information available to the decision maker. In my opinion, the professional staff, both administrators and teachers, have valuable information and experience and should be involved in developing our priorities. These people, after all, are our educational experts who work daily in the system. In addition, I think that we, the public, have an important role to play and specific opportunities should be provided for our own carefully considered advice and convictions.

I think that our educational system must first be charged with the responsibility of providing students with a reasonable level of accomplishment in academic skills. But, beyond that, a good system should offer a program broad enough in scope to provide options and choices so that the individual needs and abilities of children can be met and enriched. And I think this responsibility is owed to all students, those of average ability as well as those of above and below average ability, those who are educationally disadvantaged and those who have special educational needs.

I also think our schools must develop in our children a positive attitude toward learning, and must supply them with the tools and techniques they will need to pursue the learning process on a continuing lifetime basis.

Therefore, I would give priority first to the basics in education, which I understand to include music, art, library, and physical education, all of them basic to the creation of the well-rounded individual. I would also rank as basic an adequate supply of materials and texts and the reasonable maintenance of buildings and equipment.

I would give an equally high priority to a pupil-teacher ratio low

enough to permit students easy access to teachers, especially in the lower grades.

In addition, I would give important ranking to curriculum and staff development.

No major business operates without research and development. In an educational context, this means a continuing effort to upgrade the skills of our professional employees and to improve our educational program.

Once we have established budget priorities, what else can we do to see that our educational dollar is wisely spent? This brings me to my third and final point: the evaluation of our educational investment.

Here I believe we can make progress in several areas. In the administrative area, we should have in-depth study done by a professional management consultant firm to determine whether our present organization results in the most effective, efficient, and economical management of our schools. Such a study, similar to those performed in Glen Rock and Fair Lawn in recent years, could include a consideration of the roles of administrators throughout the entire system, as well as guidance counselors, clerical employees, and maintenance and custodial personnel. And it should include the formulation of job descriptions so that we can precisely evaluate the job to be done in the future.

Along the same lines, we should examine the degree of efficiency in teacher assignments. For example, while other teachers in the system teach five or six classes a day, many high school teachers teach only four classes and have a fifth assignment as hallway monitor, study hall attendant, or the like. Is this not an economic waste of a valuable professional's time?

In the area of curriculum, we should establish the goals and objectives of our schools as required by the new state legislation. This will enable us to decide if our program is meeting the standards that we have set for ourselves.

At a time when we are faced with hard choices in our schools, we must look very closely at the value of other program expenses. Consider, for example, some of the field trips our children take. Can we justify the expense of transporting elementary school children to a farm to see the pumpkins at Halloween at a time when we are cutting back essential library services? We might do well to search out other areas where parents can serve the schools and their children on a volunteer basis—for

example, in the lunch program and after-school recreation programs.

Last, there is the question of our teachers. Quite simply, I believe that upgrading the performance of our teaching staff is the most promising way for us to improve the efficiency and effectiveness of our system.

Our staff is our most valuable resource, and by and large, I believe we have a highly qualified group of educators. But as I talk to parents and other citizens, I hear an increasing number of complaints about the competency of individual staff members.

For several years, our teachers have been rated by administrators with a formal evaluation guide. The guide, which is completed jointly by the teacher and the administrator, rates the teacher from poor to superior in nine separate areas of instructional competence such as careful planning and sound preparation, command of subject matter, and effective use of teaching and learning materials, as well as on the teacher's personal relationship to the rest of the staff and the students.

Recently, the board adopted a policy of granting tenure only to personnel rated "superior." While I applaud that action, I feel it does not go far enough. The attainment of tenure should not be the be-all and end-all. I believe that we must concentrate on creating evaluations and standards for tenured personnel. Declining enrollments will in the foreseeable future reduce our demand for teachers. Two-thirds of our staff are already tenured, and that percentage will continue to increase as the number of new teachers entering our systems decreases. Thus, we should direct our efforts to maintaining and in some cases upgrading the level of performance of tenured personnel.

I think our present method of evaluation of tenured personnel is unsatisfactory. If our objective is indeed to encourage good teaching, to stimulate professional growth, and to define areas to be improved, I think we need to be in better touch with what the teacher is doing, certainly at least with those whose performance is deficient. Our present process of evaluation lacks an essential and logical ingredient; namely, a written plan for the professional development or improvement of the individual being evaluated.

A teacher who has been rated deficient should be required to develop a plan for improving his or her skills. Such a plan would probably best be developed and resolved by the joint efforts of the teacher and his or her superior and might include such things as refresher courses, teacher

workshops, or in-service training.

Each teacher's plan should be reviewed periodically and would serve as that teacher's commitment to maintain or increase classroom effectiveness.

Such an evaluation process would also serve as the vehicle for the board to exercise the discretionary authority it has by law to withhold the salary increment of a teacher who doesn't measure up.

For the next year, for example, we are allocating over $200 thousand for teacher salary increases. Traditionally, these have been automatic raises based on nothing more than the passage of time and given in addition to the annual negotiated raise until the professional reaches a maximum of fifteen years of employment.

If a superior rating can be the prerequisite for receiving tenure, it should certainly serve the same role in determining whether or not a teacher with tenure should receive an increment.

Thank you for giving me this opportunity to share with you some of my thoughts and concerns about the well-being of our schools. I would now like to hear about some of your concerns and try to answer any questions you might have.

Analysis: *The presentation is based on the candidate's platform. Careful preparation is evident here as a thoughtful and thorough account of positions is discussed. Note that the presentation should not exceed ten to fifteen minutes and should be delivered slowly, while establishing eye contact with those present. Ample opportunity for questions from the audience should be built into the evening (twenty minutes plus). The candidate, no matter how well prepared, should view the question-and-answer period as an opportunity not only to respond to questions but also to learn from those present. Interaction between a candidate and prospective voters is essential to the campaign effort and tone.*

Letter to Walkers and Other Supporters

Candidate John Doe
One Main Street
Ridgewood, New Jersey 07450

April 2, 198-

Dear Friend:

As we move into the final days of the campaign, I want to thank you all very much for working so hard to make sure that we get out a big vote on April 8. Everyone has been great in volunteering for the many jobs we have had to do to reach the supporters of quality education for the Ridgewood schools. All of our work has gone well; we have had good neighborhood gatherings with stimulating questions, effective literature has been mailed on schedule, and enthusiastic callers have kept the phones going.

All of our good work has been in a sense a prelude to these final few days. We all recognize how important it is to get our friends to the voting booths. To encourage the voters, we need an enthusiastic effort from our "get-out-the-vote" phoners and from our walkers for John Doe. I know that both of these activities have been carefully organized and am sure they will go well.

On Saturday morning, April 5, at Ridgewood High School (Room 145), I will be saying hello to all of you who have offered to walk for me and distribute literature over the weekend. I look forward to sharing coffee and doughnuts as a team before we go off to get the vote. For those of you who will not be with us on Saturday, I would like to take this opportunity to thank you for your part in making the Elect John Doe Campaign Effort a success.

Finally, Beatrice and I would like to share that special time called "waiting for returns" with all of you who have contributed to our campaign to ensure excellence in the Ridgewood schools. I look forward to celebrating our victory with you at my home on Tuesday night any time after 9 p.m.

All of us share a pride in the quality of the Ridgewood schools. That excellence depends upon the continued support of us all. Again, thanks for joining in this campaign.

Kindest regards,

John Doe

The Absentee Ballots Chairperson

Sample Letter to Absentee Voters (New Voters)

Committee to Elect John Doe
One Main Street
Ridgewood, New Jersey 07450

March 14, 198-

Dear Fellow Grads of Ridgewood High:

You are probably all aware that we left Ridgewood High School in an uncertain state when we graduated last June. Severe budget cuts threatened some programs and our last year of school was marked by a growing concern over the philosophy of education in Ridgewood schools.

The problems of education are of paramount importance in this April's school board election. We urge you all, if you will not be in town on April 8, Election Day, to complete and return the enclosed application as soon as possible. Although we have left Ridgewood High School behind us, our voices are still important, and our responsibility toward better education is greater than before.

This year there are seven candidates for the two seats on the school board. The main issues the candidates have concerned themselves with are cost of education, allotment of funds, and subject priorities.

One candidate, John Doe, has shown a rare combination of experience, objectivity, and genuine concern for the Ridgewood schools. A former professor at State University, he has a firsthand grip of the educational process that comes from twenty years of teaching and academic administration. Now president of International Isotopes, a firm engaged in the applications of nuclear science and engineering, he also brings to our schools both management tools and financial know-how. His three children currently attend the Ridgewood public schools. John's extensive community work includes several years as Home and School President for the Travell School. From firsthand experience he has developed a clear and forceful program for the way he believes our schools must go. This includes the belief that education is a team effort, including the board, the professional staff, and the parents; the conviction that the board's job is not to "meddle" in but to help guide the direction of

school affairs and a dedication to learning as an ongoing process of personal growth. His goals and priorities center around fostering improved education with less money.

As coordinator for new voters in John's campaign, I urge you to write for your absentee ballot, using the enclosed form and envelope, and to vote for John. Please note that your application must be received before the April 1 deadline. My only regret as I close this letter is that John did not run for the school board while I was still enrolled in the Ridgewood schools.

Sincerely,

Michael Smith
NEW VOTERS FOR DOE

Enclosures

Sample Follow-up Letter to Absentee Voters (New Voters)

Committee to Elect John Doe
One Main Street
Ridgewood, New Jersey 07450

March 21, 198-

Dear New Voter:

We hope you have received your absentee ballot application and have returned it to the secretary of the board of education.

Many of us away at school cannot keep in close contact with events at home, but since we know of your interest in the upcoming board of education election, we have enclosed newspaper ads describing the positions of all the candidates.

We believe you will agree with us that John is the best candidate.

Sincerely,

Michael Smith
NEW VOTERS FOR DOE

Enclosures

The Aides Chairperson

Sample Aides Candidate Introduction Sheet for Neighborhood Gatherings (to be adapted for Host/Hostess if required)

Suggested Opening Remarks re John Doe

(In presenting John, please summarize rather than read the biographical sheet verbatim to avoid detracting from the candidate's prepared text. Keep the introduction and conclusion relatively brief—under three minutes each—and avoid any provocative statements. Your words and manner may well set the tone for the Neighborhood Gathering).

Good (morning, afternoon, evening). I'm _____ , an aide in John Doe's campaign. I have the pleasure today of introducing you to John, who has come to talk to us about his candidacy for board of education. As you will see from his biographical sheet, John has been active in our school system for many years and has a vested interest in good education. His three children attend the Ridgewood schools.

John's professional credits as an educator and company president are of particular note as we wrestle with the problems of academic priorities, fund allocations, and inflation. He will be talking today about his goals and priorities for our schools and how these goals can be met in this time of rising costs.

John combines twenty years experience in teaching and administration with sixteen years of firsthand experience with our schools as a Ridgewood resident. He is clear-thinking, perceptive, and most important, sensitive to our children's needs—the kind of person in whom I am willing to place my kids' future.

My friends, John Doe.

Sample Aides Closing Remarks Sheet for Neighborhood Gatherings (to be adapted for host/hostess if required)

Suggested Closing Remarks re John Doe

You have been very kind in coming this evening. If you have not yet

signed the attendance sheet, please do so before you leave. We hope you will also want to join in our effort to put John on the school board by signing up as a campaign worker. There is a worker sign-up sheet by the door, and there are lots of important tasks to be done.

Please take the campaign literature home with you and share it with friends and neighbors. If you wish to contribute money, which is always needed, I'll be glad to take your donation now or you can mail your check to our campaign finance chairperson, Dick Jones, 20 Main Street. Please make out your check to John Doe Campaign Fund.

I hope that you will join me in supporting our candidate and vote for John on April 8. *If you know of anyone who will not be in town between 2 p.m. and 9 p.m. on that day,* please have him/her complete and mail the absentee ballot request forms that are on the table by the door. Thank you, _____, for opening your home to us today and thank you, John, for meeting with us.

The Finance Chairperson

Sample Fund Drive Letter

COMMITTEE TO ELECT JOHN DOE
One Main Street
Ridgewood, New Jersey 07450

March 12, 198-

Dear Neighbor:

The next three years will strenuously challenge Ridgewood's school system.

Inflation, budget cuts, and the ever-present need to improve the quality of our schools will require an intelligent unity of purpose by the school board. It will require exactly the quiet, confident type of leadership that John Doe has demonstrated in academic, community, and business life. For these reasons, I know you will welcome John's decision to stand for election as enthusiastically as we do.

It is important that John win with a large plurality, mandating a persuasive position on the board. We ask for your overall support

and particularly would appreciate a contribution made out to the John Doe Campaign Fund. An addressed envelope is included for your convenience.

Thank you very much for your consideration and help.

Sincerely,

Dick Jones
Finance Chairperson

Note: Where possible, a personal, handwritten note from key committee personnel to their friends should be added to this letter as follows: "Bobbi and I are supporting John. We feel he will be an asset to our school board. Please be as generous as possible. Many thanks, Brian."

Sample Fund Drive Letter Follow-up

COMMITTEE TO ELECT JOHN DOE
One Main Street
Ridgewood, New Jersey 07450

April 1, 198-

Dear Neighbor:

Several weeks ago I wrote to you asking for your support and a contribution to John Doe's campaign. We are in the thick of our effort and if you had planned to make a contribution, we would appreciate it very much if you could send a check in the next few days made out to John Doe Campaign Fund to:

Dick Jones, Finance Chair
John Doe Campaign Fund
20 Main Street
Ridgewood, New Jersey 07451

Thank you for your consideration.

Sincerely,

Dick Jones
Finance Chairperson

The Letters-to-Friends Chairperson

Sample Letter to Friends

March 12, 198-

Dear Neighbor:

Never before has a board of education election in Ridgewood been more significant!

How you vote on April 8 will affect education in our Village far longer than the term of any board member. The decisions of the two new trustees will be pivotal in determining the direction of education in Ridgewood for years to come.

One of the candidates, John Doe, possesses excellent qualifications for serving on any board of education. He combines twenty years of teaching and administration with the management and financial expertise that comes from running one's own company—in Doe's case, International Isotopes, a firm engaged in the applications of nuclear science and engineering. His strong background in both fiscal and educational matters will enable him to deal effectively with the very spectrum of problems that plagues our schools—from dealing with rising costs to setting realistic scholastic priorities and goals.

Enclosed you will find a brochure that outlines John's qualifications and educational outlook. I hope you will take the time to read it. I also hope you will want to hear what John has to say in the next few weeks. If you cannot attend one of the neighborhood gatherings or public forums, perhaps you would give John a call at home (insert phone number) and inform him of your views on the critical subject of our schools.

John is eager to serve and he knows what's at stake. I know you do too. Please vote for John on April 18.

Sincerely,

Sample Letter to Friends
Variation #1

March 18, 198-

Dear Neighbor:

I have never before written concerning a candidate for any election. Nevertheless, I am taking this opportunity to write about the election on April 8 for the board of education. I believe that the choice of the two new trustees for our school board will be crucial in determining the direction of education in Ridgewood in future years.

One of the candidates, John Doe, possesses unprecedented qualifications for serving on any board of education. He combines twenty years of teaching and administration with the management and financial expertise that comes from running one's own company—in Doe's case, International Isotopes, a firm engaged in the applications of nuclear science and engineering. His strong background in both fiscal and educational matters will enable him to deal effectively with the whole spectrum of problems that plague our schools—from dealing with rising costs to setting realistic scholastic priorities and goals.

John realizes the importance of community involvement in the schools. He is anxious to tell you about himself and his beliefs and hopes you can attend one or more neighborhood gatherings or forums to hear him express his views. He also wants to know your point of view concerning school-related issues. If you would like to meet with him or ask questions by phone, John's home number is (insert phone number).

I believe that John has the open-mindedness, integrity, energy, and background to make a superior board member. After reading the enclosed brochure, I think you will agree. Be sure to vote on April 8 in an election that is vital to our children's future.

Sincerely,

The Mailings Chairperson

Sample Cover Letter for Townwide Mailing

COMMITTEE TO ELECT JOHN DOE
One Main Street
Ridgewood, New Jersey 07450

March 26, 198-

Dear Friend:

There is no question that we all want to see an improvement in the Ridgewood Board of Education's willingness and ability to work with the staff, the students, and the community to maintain the level of excellence that our schools have always enjoyed.

And there is also no question that John Doe's presence on the board would contribute greatly to that end.

His calm, open-minded approach, coupled with his outstanding professional qualifications and experience, would help to change the board from a highly polarized, rhetoric-filled group to the positive guiding force that our community's educational system needs.

The challenges and problems that face our schools must be met decisively and effectively. That is why we believe it is so vital that John Doe be elected to the board, and by a vote that demonstrates our support of his credentials.

In the enclosed pamphlet, John Doe outlines some of the major challenges he feels face the board in the immediate future and explores some ways of meeting them. We hope you will take the time to read what John Doe has to say and if possible talk with him at the various neighborhood gatherings and public forums planned for the last weeks of the campaign.

We're convinced that if you do, you will share our commitment to vote for John on April 8th.

The Committee to Elect John Doe

The Neighborhood Gatherings Chairperson

Sample Neighborhood Gathering Instruction Sheet for Hosts/Hostesses

Dear _____:

Thank you for planning to have a neighborhood gathering for John Doe. Your time, effort, and interest will increase exposure to a highly qualified candidate in this important election. It enables John to express his views to your guests and to hear their concerns as well.

Below we have listed several suggestions that may help you in your plans.

1. Please keep your preparations as simple as possible. Cookies and coffee/tea are sufficient. Use of paper products is fine. Use name tags if you wish.

2. We hope you will have *at least* twenty-five people at your neighborhood gathering. In order to have the attendance you desire, you will probably have to invite four times that number (focus on people who don't know the candidate, who aren't committed). People don't mind sitting on the floor.

3. Before your neighborhood gathering, please send the appropriate one of us a complete list of those you have invited.

4. Plan on half an hour for coffee before John's presentation. This coffee period provides an easy, pleasant opportunity to familiarize guests with the candidate on an informal level.

5. An aide will arrive shortly before the party with biographical information and other campaign literature which will be put in a prominent place for your guests.

6. After coffee, the aide will be prepared to introduce John formally to your guests unless you choose to do so, and will have some closing words after the question-and-answer period. If you choose to introduce the candidate and/or close the meeting, the aide will give you suggested remarks sheets, which we would appreciate your using.

7. After John's presentation and either during or after the question-and-answer period, the aide will ask those present to sign the attendance list or any other sign-up sheet that has been brought, unless you do so (see

suggested closing remarks sheet). Immediately following the questions and answers, some of your guests may leave. Others may linger. We would appreciate your asking the latter group to stay for an additional cup of coffee.

8. Be aware that if you have twenty-five guests at your party, each will probably influence five friends to vote for the candidate and you will have brought in 125 votes!

We sincerely thank you for your support, your help, and your hard work. If you have any questions, please call us.

West Side Chairperson
Stan Baker
(insert phone number)

East Side Chairperson
Julie Cohen
(insert phone number)

Sample Neighborhood Gathering Worker Sign-up Sheet (Can also be inserted in a general mailing)

JOHN DOE; CANDIDATE, BOARD OF EDUCATION

We would welcome your active support of John Doe's candidacy. Please indicate below how you can help and return to Committee to Elect John Doe, One Main Street, Ridgewood, New Jersey 07450.

I can assist by—

☐ Telephoning
☐ Doing clerical work
☐ Giving a neighborhood gathering or assisting a host/hostess
☐ Writing a letter to the editor
☐ Allowing my name to be used in a newspaper testimonial for John
☐ Participating in the walkathon
☐ Offering financial aid (make check payable to John Doe Campaign Fund and mail to Dick Jones, Finance Chairperson, John Doe Campaign Fund, 20 Main Street, Ridgewood, New Jersey 07451
☐ Other

Name _____ Phone _____
Address _____

Sample Voter Information Sheet for Neighborhood Gathering Packet

VOTER INFORMATION

1. Election Day—Tuesday, April 8
   Polls open 2-9 p.m.
   Polling places:

District(s)	*Polling Place*	*District(s)*	*Polling Place*
1, 2, 3	Willard	15, 16	Franklin Jr. H.S.
4, 7	Washington	14	Glen
5, 6, 10	Orchard	17, 18	Somerville
8, 11	Travell	19	Hawes
9, 12, 13	High School		

   Seven candidates. Each person may vote for two.
2. Absentee Ballots.
   a. Obtain applications and request ballots. Requests must be received no later than April 1.
   b. Cast ballot by date designated by the local board of elections.
3. Dates to remember.

Budget Hearing	Monday, March 17, 8 p.m. Ben Franklin Auditorium
Republican Club Forum	Thursday, March 20, 8 p.m. George Washington Auditorium
Parochial School Forum	Monday, March 23, 8 p.m. St. Agnes School Auditorium Fairmount Road
Parent Organization Forum	Wednesday, March 26, 8 p.m. Ben Franklin Auditorium
League of Women Voters	Monday, March 31, 8 p.m. George Washington Auditorium
Teachers Assn. Forum	Wednesday, April 2, 3:30 p.m. Ridgewood High School Auditorium
Democratic Club Forum	Thursday, April 3, 8 p.m. George Washington Auditorium

4. John's ballot position is line #6.

The Publicity Chairperson

Sample Press Release for Candidate's Announcement #1

Ridgewood, NJ, Friday, February 29. John Doe of One Main Street has announced that he will seek election to the board of education in the upcoming April election.

In his announcement, Candidate Doe stated that he is running because of a genuine concern over the way in which the present board has been dealing with many critical issues and a conviction that he is qualified to serve in a significant and productive manner.

Doe said that he thinks that the majority of the citizens would agree that our present board has demonstrated a lack of true responsiveness to the views of the community and a disregard for the need to establish a harmonious working relationship between itself and our school administrators.

The candidate indicated that he feels that some of the most challenging issues facing our school system over the next few years will be:

- Maintaining a high quality educational system that is progressive and responsive to the needs of the community.
- Managing the enormous cost of running our system at a time of great financial uncertainty for our country and community.

Doe stated that he feels that these issues can only be effectively managed in an atmosphere of openness and trust, and with greater participation on the part of the community and our educational professionals in the formulation of the basic direction for the schools.

In his announcement, Doe described himself as an independent who is declaring his intentions early in order to take full advantage of the time available to meet with as many citizens as possible to listen to their views and seek their support.

Doe is a 1952 graduate of Rutgers University. He received his M.B.A. in engineering in 1955 from State University. A former professor at State University, he is president of International Isotopes, a company engaged in the applications of nuclear science and engineering. Doe and his wife, Beatrice, have lived in Ridgewood for the past sixteen years. Their three

children, Ann, John, and Jim, currently attend the Ridgewood public schools.

Committee to Elect John Doe Vote Line 6 on April 8

Sample Press Release for Candidate's Announcement #2

Ridgewood, NJ, Friday, February 29. John Doe today announced his candidacy for election to the Ridgewood Board of Education in April.

In announcing his candidacy, Mr. Doe affirmed the high value that he places on the quality of our schools and the education of our youngsters. Candidate Doe believes his experience as an educator and administrator combined with the managerial tools acquired as president of his own company, International Isotopes, will enable him to deal effectively with the issues that face our schools.

In his statement, Candidate Doe said, "Our school board faces an enormously difficult challenge, that of maintaining a high quality school system at a time of economic uncertainty and stress. Voters pinched by today's economy cannot tolerate big spending. What we must somehow do is get more for less. I believe I can help the board accomplish this."

Candidate Doe continued: "I think our schools should certainly stress the basics. They are essential. But the schools must go further; they must prepare our children for a productive life by teaching them how to continue to *learn* long after the school years are over. Education is an ongoing process that enriches every day of our lives."

"Since my three children all attend the public schools, I have had extensive personal exposure to the fine tradition of education in our Village schools. I intend to do all I can to foster that excellence in the years to come," Candidate Doe concluded.

Committee to Elect John Doe Vote Line 6 on April 8

Sample Press Release for Literature Drop

LIT DROP PLANNED FOR JOHN DOE

Ridgewood, NJ, Monday, March 24. Village supporters of Ridgewood Board of Education Candidate John Doe will hit the streets this week,

tucking campaign literature under doormats and inside screen doors to encourage their neighbors to vote for John on April 8.

The Committee to Elect John Doe, which is organizing the drive, hopes to get 100 percent coverage of Ridgewood homes.

Shown here reviewing plans for the Lit Drop are Campaign Manager O.C. Black and Literature Drop Committee Chairperson Joan Simon.

Committee to Elect John Doe Vote Line 6 on April 8

Sample Press Release for Walkathon

DON'T TAKE OUR WORD THAT JOHN DOE DESERVES YOUR VOTE FOR THE RIDGEWOOD BOARD OF EDUCATION— LISTEN TO YOUR NEIGHBORS.

Ridgewood, NJ, Tuesday, April 1. Over 300 of them, from every single part of Ridgewood, will be out walking for John between now and Election Day this coming Tuesday.

Their purpose? To make sure that every resident of Ridgewood understands the importance of this year's school board election, and to convince as many of them as possible to cast one of their votes for John Doe.

They, like we, John's Campaign Committee, realize that John is outstanding in qualifications and the educational philosophy he offers the Village. John has spent most of his professional life in the academic and administrative areas of education. More important, John's "walkers" believe that their candidate will bring to the board a rational, open-minded attitude that is needed if it is to function again as a cohesive, constructive unit.

So listen to John's supporters when they knock on your door—whether you've made up your mind on the election already or not. Or if, for some reason, one of them doesn't call on you, you call one of them. Their names are listed below.

Either way, all it will cost you is a few minutes of your time, which is a small price to pay for protecting one of the Village's greatest assets—its schools.

John's Walkers:
(List of people)

Committee to Elect John Doe
Vote Line 6 on April 8

Sample Newspaper Ad #1

TODAY, RIDGEWOOD
DESPERATELY NEEDS
JOHN DOE.
FOR TOMORROW'S SAKE.

Educator, administrator, and company president John Doe is uniquely equipped to become a positive guiding force in our community's educational system.

That is why we believe it is vital that Candidate Doe be elected a school board trustee on April 8.

The problems and challenges that face our schools present an ever-increasing challenge—a challenge that John Doe has the experience to meet.

Maintaining excellence in our schools is what we're all after. Ensuring excellence on our board is where it all starts.

ENSURE EXCELLENCE—ELECT JOHN DOE*

Sample Newspaper Ad #2

We Believe in John Doe

We believe in Candidate Doe because he has proved the ability to excel as an educator, administrator, and company president.

We believe in John's conviction that he can translate present professionalism into a future of solid, constructive leadership on the school board.

We believe in John's vision: a dedication to quality education for all our children.

We believe in John because he offers no simplistic answers to the complex problems that face our schools today and in the years ahead—

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*Note consistent use of campaign theme in newspaper ads, brochures, and other literature. The theme will vary with the nature of the candidate and the tenor of the times, but must encapsulate the candidate's priorities and thrust.

but, instead, the promise that he will continue to work tirelessly and unselfishly to find solutions.

We believe in Candidate Doe because he has faith in our children and their ability not only to cope with the world of the eighties, but to lead us to a better society.

We believe in John because he realizes that in order to prepare our children for that challenge we must provide them with an education that is relevant—an education that will enable them to challenge the eighties and prepare for the nineties.

Don't forget to cast your vote on April 8. The choice and, consequently, the direction of the Ridgewood School system in the immediate future is up to you. We've already made *our* decision. We believe in John Doe.

ENSURE EXCELLENCE—ELECT JOHN DOE

Paid for by the Committee to Elect John Doe.
Dick Jones, Treasurer
List of Supporters:

Sample Campaign Brochure

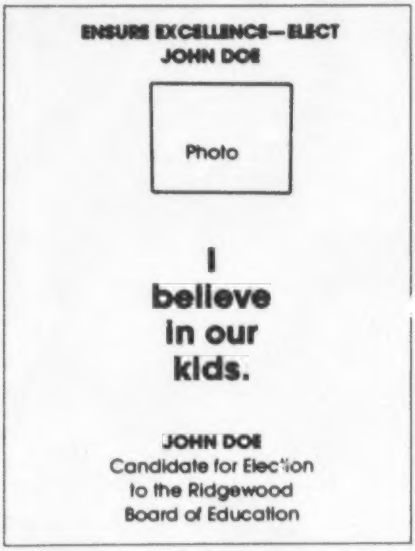
(see cover on facing page)

Ridgewood has built a superior school system over the years. We must maintain or improve this standard for the sake of our children. They are worth it.

Today our children have greater skills, more information, and fuller awareness of the world than in any prior generation. Their world is more complex. They experience greater pressures. Nevertheless, with support in the home, church and community, and an educational system geared for the times, I believe our kids will not only cope with the world of the eighties, but will lead us to a better society.

To give our children a firm intellectual foundation, we must stress the basic skills of reading, communication and mathematics in our elementary schools. We must use the most effective methods. We must individualize the instruction as much as possible so that the slower student receives special attention and continuity in each subject and the faster learner has no barriers to growth. The composite Iowa test scores

for this year show that the average grade of Ridgewood pupils is at about the ninetieth percentile nationally. This is an impressive record and one we must work to maintain.



Last year the graduating class at Ridgewood High School won more than 150 special awards, including 40 citations from the prestigious National Merit Scholarship program, one Presidential scholar, and state championships in biology, chemistry, and physics, to say nothing of their performance in athletic competition, industrial arts and journalism. These achievements result from a combination of motivated young people, a superior teaching staff, and a strong curriculum. I believe we can do even better. We can improve motivation by making our schools more personal and our staff more accessible to the students. We can improve our already fine staff by more thorough recruitment and evaluation procedures. We can improve our curriculum by continuing research and openness to new programs that have proven successful

elsewhere. We can improve school/community relations through a greater public involvement in the educational process. Our commitment must be to enhance the education of all students, particularly the large group in the middle.

To prepare our graduates for the free and complex world of vocation or university, we must endeavor to instill self-discipline, civic responsibility, and social awareness. We must prepare them to think critically, to recognize political extremes for what they are, to appreciate the uniqueness and value of the American heritage and to work within the system for constructive change.

I believe that as a result of their educational experience in Ridgewood, our children will make greater contributions to our society and exercise their citizenship more fully than we have. I look forward to telling you more about my beliefs at neighborhood gatherings and public forums. Do not hesitate to call me at home (insert phone number) to share your beliefs.

With most other parents in our community, I am not fearful of the future of our nation because I believe in our kids.

John Doe-Some vital statistics

- John Doe is president of International Isotopes, a company engaged in the applications of nuclear science and engineering.
- Twenty years of experience in teaching and administration.
- Board of trustees of several educational and philanthropic organizations.
- Policy formulation in wage and salary administration and union negotiations.
- Management responsibility in budget preparation, analysis, and control.
- Seminars and lectureships at Teachers Colleges in areas of engineering and management.

John received his M.B.A. from State University in 1955 and a B.S. in chemical engineering from Rutgers University in 1952. He is a member of several scientific societies, including the American Chemical Society, and the American Association for the Advancement of Science. He has been the recipient of many awards and lectureships.

From 1956 until 1975 John was on the faculty of State University. He

has served as a consultant to industrial firms and government agencies.

John and his wife Beatrice have lived in Ridgewood for the past sixteen years, currently at One Main Street. All three of their children attend the Ridgewood schools. Ann is a high school senior, John is in junior high school, and Jim is in elementary school.

Community activities include:

Citizens Park Association, Director
Eastside Episcopalian Church, Elder
Ridgewood Tennis Association, President
Boy Scouts, Merit Badge Counselor
President, Home and School Association, Travell School
Ridgewood Association for Good Schools
Long Range Planning Committee, Meadow Hospital

Paid for by the John Doe Campaign Committee, Dick Jones, Treasurer.

Sample Palm Card for Walkathon

Palm Card Illustration:

The palm card illustrated is one of several possible variations. Although illustrated at approximately half normal size, the card could be smaller, larger, longer, wider, and it could be printed on one or both sides. Individual campaign needs will dictate the size and content of the card, e.g., is your community rural, sparsely populated or urban with high density populations? Do you have a large volunteer force in this campaign or will your volunteer-walkers have to cover large areas?

In rural areas and small communities the candidates will most likely have some public recognition in which case the walker-volunteer could accomplish his/her task by ringing the doorbell, and engaging the citizen in conversation that includes answering questions about the candidate and his/her performance. In this case, the palm card could simply include the highlights of the platform and biographical data.

If the volunteer force is limited and the population and geographic density greater, the palm card could include more extensive information as the volunteer will be more pressed for time and his/her comments could be as brief as, "I am supporting John/Jane Doe for election on April 8th. Please vote and consider his/her candidacy."

Ensure Excellence
JOHN DOE
we need him
now

Our school system is one of our community's greatest assets—and the outcome of this election will have a significant and lasting effect on that asset, and the educational experiences of our children for years to come.

Of the seven candidates JOHN DOE can best bring to the Ridgewood Board of Education the rational, open-minded attitude that is needed if it is to function again as a cohesive, constructive unit.

He is outstanding in the qualifications and educational philosophy he offers the Village. He has spent most of his professional life in the academic and administrative areas of education.

Our children deserve the best. JOHN DOE deserves your vote.

VOTE LINE 6 ON APRIL 8

Paid for by the John Doe Campaign Committee, Dick Jones, Treasurer

The Telephone/"Get-Out-the-Vote" Chairperson

Sample Instruction Sheet for Phone Callers

PLEASE READ BEFORE STARTING TO TELEPHONE

1. Look over phone list, neighborhood gathering schedule, and voting district map to familiarize yourself with area being covered.
2. Read over suggested approach for telephoners sheet.
3. *Call only names that are coded as follows:*
   A—(Definitely voting for John)
   B—(Possibly voting for John)
   Do not call anyone coded with the letter C. These are negative voters. As you complete each call, if you feel the code is correct, *circle the code. If the code is wrong, change it and circle.* (Circle indicates that the person has been called).
4. Note the following:
   a. Name, address, and telephone number of anyone who wishes to be invited to a neighborhood gathering in their area. I will route this list to the neighborhood gatherings chairperson, who will see that the host/hostess calls. If invitations to neighborhood gatherings have been printed (rarely the case), address envelopes to those expressing interest and leave them for me to follow-through.
   b. Name, address, and telephone number of anyone who indicates willingness to help out in any way in John's campaign. This would include a donation and/or participation in the walkathon, "get-out-the-vote" effort, and/or literature drop (if any). Leave this list for me.
   c. Name, address, and telephone number of anyone who needs an absentee ballot. I will see that they get them.

IF YOU FIND YOURSELF TELEPHONING ALONE, PLEASE TRY TO CONTACT THE OTHER PERSON SCHEDULED TO PHONE (CONSULT POSTED SCHEDULE).

Sample Script for Phone Calling

Suggested Approach for Telephoners

"Hello, Mr./Ms. _____, this is _____. I'm calling on behalf of John Doe, who is running for election to the Ridgewood Board of Education. Have you met John?"

If yes, ask if they feel that they will support John's candidacy. If so, ask if they would be interested in attending a neighborhood gathering to hear his views and get a chance to meet him. If they do not want to meet John in an informal setting, tell them the dates of the public forums. Ask if anyone in their family will need an absentee ballot.

Be friendly and enthusiastic, but don't get into any lengthy discussions. If they have specific questions, make a note of these and route the information to me. I will see that John contacts them personally.

Be sure to circle coded letters when calling and to recode where needed (see Phone Pollers Instruction Sheet).

Sample Instruction Sheet for "Get-out-the-Vote" Telephoners

ELECT JOHN DOE

Many thanks for joining the "get-out-the-vote" campaign. As you know, this final effort is absolutely crucial in getting those people to the polls who will support John. Though your list of calls is purposely not lengthy, it is a vital link in this phoning effort. Keep in mind that last year's election was won by six votes. Your calls and other personal efforts will make the difference!

1. Make your "vote reminder" calls on Monday evening (April 7) or Tuesday (April 8), preferably Monday. Offer a ride to the polls, if possible.

2. Know the appropriate polling place for your calls before you start. Election Day is April 8.

3. Suggested format:

"Hello, this is _____.

I am calling on behalf of John Doe. I want to remind you (and the other

voters in your household) that tomorrow (today) is the board of education election and the polls are open from two in the afternoon until nine in the evening. Do you need a ride to the polls? This is an extremely important election and I hope you will make every effort to get to (*polling place*) to vote. John needs your vote. Thank you."

4. Calls should be brief and cordial. *Avoid* getting into discussions about campaign issues or the opposition.

5. Call your district captain when you have finished your calls. Someone need a ride? Call _____.

We anticipate an extremely close election. You have shown your support of John by volunteering to make these calls. Now it is imperative that you convey your enthusiasm to the persons you are calling. Happy Calling!

If you have questions, need any help, or there is anything you think we should know, please leave me a note or call your day captain or me. Thanks very much for your help.

Jane Black

Telephone/"Get-Out-the-Vote" Chairperson

The Walkathon Chairperson

Sample Letter from Candidate to Walkers

One Main Street
Ridgewood, New Jersey 07450

April 1, 198-

Dear Neighbor:

Election Day is almost here. We have all worked so hard and victory seems so near, but to give us that winning edge, we need to make an extra effort during these last few days.

Saturday, April 5, is going to be the beginning of that extra effort. That's the day we all meet to kick off our walkathon. Thanks so much

for volunteering some more of your time to help get our message across to the residents of the Village.

We will assemble at Ridgewood High at 9 a.m. in Room 145 to share coffee and doughnuts before setting off to ask our neighbors to join us in voting line 6, for John Doe.

See you there,

John

Sample Procedure Sheet for Walkathon

1. *Meeting time for pre-walk rally*
   Saturday, April 5, from 9 a.m. to 12 noon
2. *Meeting place for pre-walk rally*
   Ridgewood High School, Room 145
3. *Goal*

The goal of the walkathon is for every voter in Ridgewood to be met individually by a neighborhood John Doe supporter. Where this is not possible, leaving a palm card at the house of the voter will suffice. This is going to be a tight race, and it is important that John get the maximum possible exposure.

4. *Recruitment procedure—the rally*

In order to make the walkathon manageable, Ridgewood has been split into districts. Each walker has been assigned to a subdivision of the district in which he lives. From fifteen to twenty homes will be visited by each walker during the day. Walkers will be solicited by the walkathon and telephone/"get-out-the-vote" chairpersons and members of their committees. They will be reminded of their commitment through a thank-you letter from the candidate and a call from their district captain a few days before the event.

The two basic tools employed by the walkers are the palm card and subdivisions of district maps. These will be distributed to the walkers at the Saturday, April 5, rally at the high school along with this instruction sheet. The walkathon district captains will ensure that any walker who cannot attend the rally receives his or her materials at home. After

picking up cards, instruction sheets, and maps, enjoying coffee and doughnuts, hearing a few words from the candidate, and receiving last-minute instructions from the walkathon chairperson, the walkers will embark on their walk, which should be completed that day.

5. *Procedure to be followed by walkers during the walkathon*

a. Knock on your neighbors' doors and tell them how much you care about the school board election and that this is why you want to speak to them. Inform them that it is because you care about the schools that you are supporting John Doe.

b. Give them a palm card and remind them of Election Day, April 8.

c. Assure them that if they have any questions they may call John at home (insert phone number). Be sure to thank them for their time.

If no one is at home when you call, please remember to leave the palm card under the doormat or inside the screen door. *It is illegal to leave material in the mailbox.*

Thank you very much. Enjoy your walk!

Matt White
Chairperson
Telephone: _____

Appendix A

State School Board Associations

Alabama Association of School Boards
P.O. Box 11475
4250 Lomac St.
Montgomery, AL 36106
(205) 277-9700
Dr. Randy Quinn, Executive Director

Association of Alaska School Boards
326 Fourth Street, Suite 204
Juneau, AK 99801
(907) 586-1083/586-3394
Robert C. Greene, Executive Secretary

Arizona School Boards Association
2602 West Osborne Road
Phoenix, AZ 85017
(602) 257-3700
Mrs. Lou E. Kleinz, Executive Director

Arkansas School Boards Association
85 Bishop Street
Little Rock, AR 72202
(501) 372-1415
J.K. Williams, Executive Director

California School Boards Association
916 - 23rd Street
Sacramento, CA 95816
(916) 443-4691
Dr. Herbert E. Salinger, Executive Director

Colorado Association of School Boards
1330 Logan Street
Denver, CO 80203
(303) 832-6691
Dr. Frank S. Miles, Executive Director

Connecticut Association of Boards of Education
275 Windsor Street
Hartford, CT 06120
(203) 522-8201
Terry P. Cassidy, Executive Director

Delaware School Boards Association
P.O. Box 1277
Bank of Delaware Bldg., Suite 204
Dover, DE 19901
(302) 678-2265
Ann C. Case, Executive Director

Board of Education of the District of Columbia
415 Twelfth Street, NW
Washington, DC 20004
(202) 724-4289
N. Carl Cannon, Executive Secretary

Florida School Boards Association
203 South Monroe Street
Tallahassee, FL 32301
(904) 224-1374
Dr. Donald R. Magruder, Executive Director

Georgia School Boards Association
Suite 111
3050 Presidential Drive
Atlanta, GA 30340
(404) 452-1742
Gary Ashley, Executive Vice President

Hawaii State Board of Education
P.O. Box 2360
Honolulu, HI 96804
(808) 548-6405
Dr. Donna H. Thompson, Executive Secretary

Idaho School Boards Association
P.O. Box 2577
427 Idaho Building
Boise, ID 83701
(208) 342-6441
Alan Smith, Executive Director

Illinois Association of School Boards
1209 South Fifth Street
Springfield, IL 62703
(217) 528-9688
Dr. Harold P. Seamon, Executive Director

Indiana School Boards Association
222 North New Jersey
Indianapolis, IN 46204
(317) 264-3567
Dr. Wendall J. Peterson, Executive Director

Iowa Association of School Boards
707 Midland Financial Building
6th Avenue at Mulberry
Des Moines, IA 50309
(515) 288-1991
T.E. Davidson, Executive Director

Kansas Association of School Boards
5401 Southwest 7th Avenue
Topeka, KS 66606
(913) 273-3600
Dr. K.D. Maran, Acting Executive Director

Kentucky School Boards Association
Box 93A
Route 3, Millville Road
Englewood Office Park
Frankfort, Kentucky 40602
(502) 695-4630
Dr. David L. Keller, Executive Director

Louisiana School Boards Association
P.O. Drawer 80459
8018 One Calais Avenue
Baton Rouge, LA 70898
(504) 769-3191
James D. Prescott, Executive Secretary

Maine School Boards Association
108 Sewall Street
Augusta, ME 04330
(207) 622-3473
Paul E. Brunelle, Executive Director

Maryland Association of Boards of Education
130 Holiday Court, Suite 105
Annapolis, MD 21401
(301) 841-5414
Maureen K. Steinecke, Executive Director

Massachusetts Association of School Committees
73 Tremont Street - Room 1115
Boston, MA 02108
(617) 523-1250
Paul H. Gorden, Executive Director

Michigan Association of School Boards
421 West Kalamazoo
Lansing, MI 48933
(517) 371-5700
Dr. Norman P. Weinheimer, Executive Director

Minnesota School Boards Association
P.O. Box 119
St. Peter, MN 56082
(507) 931-2450
W.A. Wettergren, Executive Secretary

Mississippi School Boards Association
P.O. Box 203
Clinton, MS 39056
(601) 924-2001
John L. Hartman, Executive Director

Missouri School Boards Association
305 Noyes Hall
University of Missouri-Columbia
Columbia, MO 65211
(314) 449-3831
Dr. Joseph A. Sarthory, Executive Director

Montana School Boards Association
501 North Sanders
Helena, MT 59601
(406) 442-2180
Wayne G. Buchanan, Executive Director

Nebraska State School Boards Association
The Executive Building
Room 305, 521 South Fourteenth Street
Lincoln, NE 68508
(402) 475-4951
Justin P. King, Executive Director

Nevada State School Boards Association
1100 Kietzke Lane, Room 212
Reno, NV 89502
(702) 323-4828
Dr. Marvin Picollo, Executive Director

New Hampshire School Boards Association
University of New Hampshire
Morrill Hall
Durham, NH 03824
(603) 862-2152
Dr. Richard Goodman, Executive Secretary

New Jersey School Boards Association
315 West State Street
Box 909
Trenton, NJ 08605
(609) 695-7600
Dr. Lloyd J. Newbaker, Jr., Executive Director

New Mexico School Boards Association
207 Shelby Street
Santa Fe, NM 87501
(505) 983-5041
Dr. A.L. Clemmons, Executive Director

New York State School Boards Association
119 Washington Avenue
Albany, NY 12210
(518) 465-3474
Dr. Stanley L. Raub, Executive Director

North Carolina School Boards Association
P.O. Box 2476
Raleigh, NC 27602
(919) 832-7024 or 832-7032
Gene Causby, Executive Director

North Dakota School Boards Association
411 North Fourth Street
Bismarck, ND 58501
(701) 255-4127
Dr. Richard D. Ott, Executive Director

Ohio School Boards Association
700 Brooksedge Boulevard
Westerville, OH 43081
(614) 891-6466
David B. Martin, Executive Vice President

Oklahoma State School Boards Association
4001 North Lincoln, Suite 410
Oklahoma City, OK 73105
(405) 521-9033
Dr. Bob Mooneyham, Executive Director

Oregon School Boards Association
P.O. Box 1068
Salem, OR 97308
(503) 588-2800
Thomas Rigby, Executive Director

Pennsylvania School Boards Association
412 North Second Street
Harrisburg, PA 17101
(717) 233-1643
Joseph V. Oravitz, Executive Director

Rhode Island Association of School Committees
177 Airport Road
Warwick, RI 02889
(401) 738-2030
Mrs. Mary E. Cole, Executive Director

South Carolina School Boards Association
1706 Senate Street
Columbia, SC 29201
(803) 799-6607
John Cone, Executive Director

Associated School Boards of South Dakota
P.O. Box 1211
216 East Capitol
Pierre, SD 57501
(605) 224-4282
Sam Tidball, Executive Secretary

Tennessee School Boards Association
323 McLemore Street, Suite A
Nashville, TN 37203
(615) 251-1518
Merlin Cohen, Executive Director

Texas Association of School Boards
P.O. Box 400
406 East 11th Street
Austin, TX 78767
(512) 476-9116
Orbry D. Holden, Executive Director

Utah School Boards Association
199 East 7200 South
Midvale, UT 84047
(801) 566-1207
Winston Gleave, Executive Director

Vermont School Boards Association
Howard Bank Building
Box 339
Montpelier, VT 05602
(802) 223-3580
Kathleen Scheele, Executive Director

Virgin Islands Board of Education
P.O. Box 9128
Commandant Gade O.V. No. 11
Charlotte Amalie
St. Thomas, VI 00801
(809) 774-4546
Mrs. Esonia M. Hassell, Executive Director

Virginia School Boards Association
University of Virginia, Ruffner Hall
405 Emmet Street
Charlottesville, VA 22903
(804) 924-3170
Dr. George W. Holmes, III, Executive Secretary

Washington State School Directors Association
200 East Union Avenue
Olympia, WA 98501
(206) 753-3305
Dr. Charles Marshall, Executive Director

West Virginia School Boards Association
P.O. Box 1008
Charleston, WV 25324
(304) 346-0571
Fred A. Hoke, Executive Director

Wisconsin Association of School Boards
P.O. Box 160
Winneconne, WI 54986
(414) 582-4443
George Tipler, Executive Director

Wyoming School Boards Association
P.O. Box 3274
University Station
University of Wyoming
Laramie, WY 82071
(307) 766-2389
Dr. James D. Andersen, Executive Secretary

Appendix B

Further Reading

Abel, Barbara. "How to Get Reelected." *American School Board Journal* 168, 4 (1981): 25-28.

Discusses the election campaign experiences of nine school board members from around the country to provide tips on campaign strategy.

Adkison, Judith. "School Board Elections and Board Responsiveness: A Case Study of the Effects of Electoral Conflict and Competition for Office." (1978) Paper presented at the Annual Meeting of the American Educational Research Association, March 27-31, 1978, Toronto, Ontario.

Examines the recent history of a southwestern school district of approximately 80,000 students and its 1977 school board election. The results of the study support the theory linking the complexity of a school district with electoral competition and with open conflict on the board and between the board and the superintendent. The two board members elected in 1977 formed a majority as the board made policy changes. Conflict and competition helped the winning candidates resist socialization pressures and maintain an independent posture, since they believed that they had a mandate from the entire community, not just from specific constituencies. It appears that the relationships identified in political theory may not necessarily represent democratic influence on policy formation at the school board level.

Carpenter, Dan. "Campaign Diary." *American School Board Journal* 167, 9 (1980): 24-29.

Offers a profile of two board candidates and the campaigns they waged in losing efforts to be elected.

Clawar, Harry J., and Levine, Jonathan. "Race and Ethnicity as Factors in Winning School Board Elections: Predicting Ethnic Composition of Community School Boards." (1979) Paper presented at the Annual Meeting of the American Educational Research Association, April 8-12, 1979, San Francisco, California.

In 1969 the New York State Legislature decentralized the New York City Public School System into 32 elected school districts with a limited amount of authority over elementary and junior high schools. The legislation provided for community school boards to be elected by district residents. An analysis of election results in 1975 and 1977 showed that neither the race nor the ethnicity of individual candidates was significantly correlated to winning. This document reports on a followup study examining the relationships between the candidate's racial and ethnic backgrounds, the ethnic character of their districts, and their rate of electoral success. The authors found that the percent of candidates from an ethnic group is overwhelmingly correlated to the percent of that ethnic group in the school district population. The percentage of school board seats won by whites tends to be greater than the percentage of white candidates, while blacks and Hispanics tend to win proportionately fewer seats.

Criswell, Larry W. "Applying the Episodic Theory to School Board Cohorts." (1981) Paper presented at the Annual Meeting of the American Educational Research Association, April 13-17, 1981, Los Angeles, California.

Indicates that the success of a school board candidate in defeating an incumbent increases the probability that other school board members originally elected at the same time as that defeated incumbent will be defeated in coming elections, while the likelihood is decreased that members elected at the same time as the successful insurgent will be defeated in coming elections.

_____. "Episodic Instability in School District Elections." *Urban Education* 15, 2 (1980): 189-213.

Presents data from four California districts supporting the theory that democratic control of school district policy occurs through episodic voter dissatisfaction leading to incumbent defeat and changes in school administration. Further asserts that the typical length of a change episode extends for as many as four successive elections.

Cryer, Roger E. "How to Keep the Feet from the Mouths of Your School Board Candidates." *American School Board Journal* 162, 9, 46 (1975).

Santa Clara County, California, school districts cooperate to hold workshops to educate school board campaigners. Six suggestions for holding similar workshops are included.

"Details: Ignore Them at Your Peril in a Contested Bid for Re-Election to Your Board." *American School Board Journal* 161, 9 (1974): 20-21.

Advice to candidates for elected office centers on the formation of committees to take care of those all-important details.

Garcia, John A. "An Analysis of Chicano and Anglo Electoral Patterns in School Board Elections." *Ethnicity* 6, 2 (1979): 168-83.

This study, examining school board elections in Tucson, Arizona, focuses on three research points: (1) The extent to which voters prefer candidates of their own racial/ethnic background; (2) The sociopolitical factors affecting these voters' preferences; and (3) The degree of voter polarization among Chicano and Anglo voters.

Hurwitz, Mark W. "What Works Best: An Elected or an Appointed School Board?" *American School Board Journal* 159, 13 (1972): 21-23.

Levine, Jonathan, and Clawar, Harry J. "A Comparative Analysis of Factors Related to a Candidate's Success or Failure in the 1975 and 1977 Community School Board Elections in New York City." (1978) Paper prepared for the American Educational Research Association Annual Meeting, March, 1978, Toronto, Canada.

In 1960, the New York City Public School System was decentralized into 32 school districts with limited authority over elementary and junior high schools. Locally elected district community school boards were provided for by state legislation. In this study factors relevant to predicting a candidate's success or failure in the 1975 and 1977 school board elections are examined. Among the variables considered are the amount of education a candidate possesses; his or her ethnic/racial background, and the extent of his or her financial backing. Reasons for conducting the study are outlined. These include the need expressed by the elections study committee for identifying problem areas in future school board elections, and the general scarcity of hard data on school board elections in New York City and elsewhere. The methodology of the study is described. The different significance of the above mentioned variables in the two election years is discussed.

Lieberman, Myron. "The Teacher Union Wants to Endorse Your Re-Election? Step Right Into the Den, Daniel." *American School Board Journal* 279, 9 (1981): 32-33.

Offers advice to school board members who might seek a teachers' union endorsement in their re-election campaigns. Includes hypothetical questions

and answers that might be given in a candidates' forum.

Lutz, Frank, and Garberina, William, L. "Demand-Response and School Board Member Incumbent Defeat." *Journal of Educational Administration* 15, 2 (1977): 279-89.

Examines a series of hypotheses related to the "gap" between what a community desires of its schools and the school board's response to those desires.

Lutz, Frank W., and others. "School Board Incumbent Defeat in Partisan Elections." (1972) Paper presented at the American Educational Research Association Annual Meeting, April 3-7, 1972, Chicago, Illinois.

Previous studies had shown that school board incumbent defeat in nonpartisan elections is related to involuntary superintendent turnover. The study investigated that relationship in partisan elections. One hundred and eighty-one Pennsylvania districts where board members are elected as Republicans or as Democrats were studied and data were subjected to chi-square analysis. Five hypotheses were tested to determine if the partisan phenomenon changed this relationship. Based on these data, partisanism did not change this political process in the politics of local school districts.

McCaffrey, Michael D. "Politics in the Schools: A Case for Partisan Board Elections." *Educational Administration Quarterly* 7, 3 (1971): 51-63.

Moen, Allen W. "The Effect of Partisan Elections on the Incumbent Defeat-Superintendent Turnover Relationship." (1976) Paper presented at the Annual Meeting of the American Educational Research Association, April 19-23, 1976, San Francisco, California.

The research reported in this paper was conducted in Pennsylvania, a state in which candidates for the school board must declare their party and run on a partisan ticket. This research was conducted to determine the effect of the partisan nature of the elections on the governance of the school district and, more specifically, to study the effect of the partisan nature of the election on incumbent school board member defeat and the turnover of superintendents in districts involved. The data revealed that incumbent defeat broadly defined as the defeat of an incumbent in either the primary or general elections is the most accurate predictor of involuntary superintendent turnover. Increased predictive accuracy cannot be obtained by examining any specific category of incumbent defeat. Thus, the findings in previous studies taking place in nonpartisan school board elections were found to be

equally applicable in partisan school district politics.

National School Boards Association. "New School Board Members: A Portrait. Research Report 1979-1." Washington, D.C., 1979.

The period just before and just after a school board member is chosen is the basis for this report. Data were collected by polling 1,000 board members and conducting indepth interviews at the 1978 National School Boards Association convention. The year preceding and the year following a board member's selection can be divided into the eligibility stage (when candidates decide to run), the campaign stage, and the socialization stage. Results of the poll indicated that previous experiences did not prepare board members for serving on boards. Respondents indicated that campaign issues in school board elections are often financial in nature with other issues like basic skills or superintedent performance also prevalent. The report is apparently the first study to use a national sample to explore specific campaign strategies used by school board candidates. The technique most often mentioned was that of talking to influential people. The survey also reveals that campaigners who are young, female, and from large districts in the South and East tend to be more active campaigners.

Nielsen, Valerie, and Robinson, Norman. "Partisan School Board Elections: New Evidence to Support Them." *Administrator's Notebook* 29, 3 (1980): 1-4.

Describes the results of a study that investigated partisan elections in large urban school districts. Estimates the extent to which political parties present voters with a clear choice of ideological and policy alternatives, and the extent to which candidates with similar educational attitudes are attracted to a particular party.

Snow, Robbie B., and Gubbins, Paula. "To Win Reelection, You Need Planning, Panache, and Plenty of Help." *American School Board Journal* 167, 10 (1980): 33-34.

Outlines the steps involved in running for the board—planning, campaigning, identifying the voters, using resources, and raising money—and offers advice about each step.

Stelzer, Leigh. "Electoral Competition and the Receptivity of School Board Members." (1972) Paper presented at the Northeastern Political Science Association Meeting, November 9-11, 1972, Amherst, Massachusetts.

Researchers have examined the relationship between the competitiveness

of elections and the responsiveness or receptivity of officials put into office by those elections. The author described his research into the competitiveness of school board elections and the receptivity of those board members. Receptivity is defined as an official's support for communication with, and participation by, his constituents. Data for the research were derived from interviews with 440 board members from 72 elective school boards distributed across the continental United States.

Taebel, Delbert A. "Politics of School Board Elections." *Urban Education* 12, 2 (1977): 153-66.

This study suggests that elected officials would be well off if they merely attain the support of the constituent voters. Constituent voters are those who have a real or perceived stake in a particular governmental entity.

Walden, John. "Antecedents to Incumbent Defeat and Superintendent Turnover." (1976) Paper presented at the Annual Meeting of the American Educational Research Association, April 19-23, 1976, San Francisco, California.

This paper discusses three related studies conducted in California in the mid-1960s that investigated factors related to incumbent defeat in school board of elections and turnover in the school superintendency. The first study dealt with turnover in the superintendency subsequent to defeat of a single incumbent board member; a significant relationship was found between incumbent defeat and involuntary turnover in the superintendency. The second study focused on the selection of new superintendents following incumbent defeat. This study showed that "new" school boards selected "outsiders" to replace superintendents who left their positions subsequent to changes on the board. The third study dealt with predictors of incumbent defeat. The strongest predictors identified were (1) percentage change in assessed valuation eight years prior to the first defeat of an incumbent, (2) percentage change in average daily attendance in the three-year period prior to incumbent defeat, and (3) the ratio of votes against incumbents to total votes cast in the school board election immediately before the election in which an incumbent was defeated.

Wegmann, Robert G. "How One Determined Man, Unknown, Unloved, and Unfunded, Won a Seat on an Important School Board." *American School Board Journal* 161, 4 (1974): 44-45.

Suggests that to use time and money to maximum effectiveness, a candidate should run a 2-level campaign, one directed at issues, the other at

making his name known.

Welch, Susan, and Karnig, Albert K. "Representation of Blacks on Big City School Boards." *Social Science Quarterly* 59, 1 (1978): 162-72.

Explores the impact of electoral institutions and selection procedures on the equity of black school-board representation in 43 large American cities.

Zeigler, L. Harmon. "What Makes School Boards Effective." (1976) Paper presented at the Annual Meeting of the National School Boards Association, April 10-13, 1976, San Francisco, California.

Two models may be used to describe school board governance. The democratic model defines effectiveness in terms of democratic criteria. It is characterized by vigorous competition for school board positions; board members are responsive to their constituencies; the superintendent acts as policy implementor rather than policy originator, and a chain of direct accountability is maintained among the public, the board, and the superintendent. The professional model dictates that board members should defer to the superintendent, who is the expert capable of making policy decisions most advantageous to the clientele (students). Selection of board members should not be characterized by controversy over the issues, as in the democratic model. Each board member must decide for himself which model (and concept of effectiveness) is most desirable. The research on which these remarks are based indicates that school boards and superintendents often fail to ascertain what their communities want. There is little citizen participation in board policy-setting. In most cases, the board follows the lead of the superintendent in policy-making. One conclusion to be drawn from this data is that the professional model is the dominant one.

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WIN

Successful school board campaigns don't just happen. They are the result of following a well-organized plan to present a candidate and his or her platform to the public. Whether you are running for school board yourself, managing someone's campaign, or providing behind the scenes support for your candidate, this book is your step-by-step guide to a winning campaign. *How to Run a School Board Campaign—and Win* will help answer important questions like these:

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- How much time does it take to run a good campaign?
- How can I recruit campaign workers?
- How do I estimate my campaign budget and keep track of expenses and income?
- How important is absentee voting?
- What can I do if the local newspaper ignores my candidacy or supports someone else?
- What laws govern the posting of lawn signs and the door-to-door delivery of literature?
- Is telephoning the best way to get out the vote?

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